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Global Nitrosyl Fluoride Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Nitrosyl Fluoride market size was valued at US$ 8.06 million in 2025 and is forecast to a readjusted size of US$ 19.81 million by 2032 with a CAGR of 12.7% during review period.

In 2025, global Nitrosyl Fluoride capacity 10 Tons, sales reached approximately 9 Tons, with an average market price of around 870 USD/Kg, industrial gross margin 41%.

Nitrosyl fluoride (NOF/FNO, CAS 7789-25-5) is a highly reactive fluorine-containing nitrogen oxide whose commercial value is increasingly tied to differentiated semiconductor etch chemistry rather than conventional bulk fluorination. The molecule has a molecular weight of 49.0045 g/mol and a normal boiling point of approximately ?59.9°C, making containment, purification and delivery central elements of the product proposition. Semiconductor-oriented technology covers purity levels from ?99% to >99.99% and >99.999%, with tighter specifications extending beyond headline assay to F?NO, nitrogen oxides, moisture and other trace gases. Air Liquide's process disclosures, for example, contemplate F?NO below 1%, with preferred thresholds of 0.1% and 0.01%, while water can be controlled below 20 ppmw in high-selectivity etch applications. This study defines the addressable market as merchant industrial- and electronic-grade NOF, including commercial NOF-containing process mixtures on a 100%-NOF-equivalent basis, while excluding laboratory reagents, analytical standards and NOF generated in situ inside customer processes without a merchant-gas transaction.

The industrial technology stack has moved beyond basic synthesis toward high-purity conversion, by-product suppression, cylinder compatibility and reproducible point-of-use

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delivery. Direct reaction of fluorine with nitric oxide—F? + 2NO ? 2FNO—is one of the most relevant routes for electronic-grade production, with F?/NO ratios controlled at or below 1/2 to suppress formation of F?NO. Recent Chinese process development uses the same underlying chemistry while diluting fluorine with inert gas and precooling the feed before reaction. Alternative industrial pathways include NO/O?/HF chemistry producing NOF in an HF medium for aromatic fluorination, as well as legacy nitrosyl-sulfuric-acid/HF and nitrite/HF processes. For semiconductor supply, however, competitive advantage resides less in the stoichiometry than in deep purification, trace-gas analytics, moisture control, surface passivation and packaging. Air Liquide has disclosed Ni-P-coated 4130X cylinders and compatible high-cleanliness delivery hardware, while Resonac has demonstrated kilogram-scale NOF storage in a 10-liter vessel and storage-pressure windows extending from 0.05 to 5 MPa.

Selective dry etching of silicon nitride in advanced memory architectures is the clearest commercial use case, because increasingly complex 3D structures place a premium on material selectivity rather than fluorine-radical generation alone. Air Liquide's disclosed process space covers SiN or polysilicon selectivity to SiO? of roughly 10–3,000, with narrower preferred ranges of 20–2,000, and high-aspect-ratio structures extending from approximately 10:1 to 1,000:1. SK Specialty has separately disclosed FNO reaction-gas concentrations of at least 20 vol%, preferably at least 25 vol%, with plasma-processing pressures around 100 mTorr to 1 Torr. These conditions shift procurement criteria toward controlled impurity fingerprints, premix consistency, cylinder stability, flow repeatability and wafer-level process qualification. Outside semiconductors, NOF chemistry is also applicable to diazotization/fluorination routes for aryl fluorides, while 2025 research has investigated NOF-based GaN surface treatment; both remain secondary to semiconductor etch as merchant-gas demand drivers.

The competitive landscape remains unusually narrow, with only a small group of specialty-gas companies showing verifiable NOF-specific process, storage or semiconductor-application capability. Air Liquide has the broadest publicly visible portfolio across selective etching and F?NO-controlled storage and supply; Resonac has developed an increasingly integrated patent estate around etching, storage and gas analysis; and SK Specialty disclosed dedicated FNO etch technology in 2025. The ownership structure of the Korean platform changed materially on March 31, 2025, when Hahn & Company completed the acquisition of an 85% interest in SK Specialty from SK Inc, while SK retained 15%; the transaction valued the company at approximately KRW4.172 trillion, with roughly KRW2.7 trillion attributed to the shares sold. Although this was a platform-level specialty-gas transaction rather than an NOF-specific acquisition, it transferred control of an FNO technology participant to a private-

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equity owner. In China, Huate Gas published a dedicated NOF preparation patent in 2026, while India's Deepak Nitrite has developed a separate NOF/HF route focused on industrial fluorination chemistry.

The next phase of market development will be determined by process insertion in advanced NAND, qualification of second sources and conversion of laboratory-scale or patent-stage chemistry into stable multi-region electronic-gas supply. Demand growth is likely to be concentrated in high-layer-count 3D NAND and other structures where high-aspect-ratio etching and SiN/SiO? selectivity become more demanding. Technology development will emphasize 4N–5N-plus purity, lower F?NO and moisture, premixed concentrations, lower on-site hazardous inventory and more robust cylinder passivation. Supply-chain competition should favor incumbent electronic-gas companies with integrated F?/NO sourcing, ultratrace analytics, customer-audit systems and local fab logistics, while Chinese localization creates an additional route for qualification-driven share gains. The principal constraints remain difficult handling, relatively long fab qualification cycles, a limited number of process steps, and continued competition from NF?, F?, other fluorinated etchants and in-situ NOF generation.

Report Scope

This report is a detailed and comprehensive analysis for global Nitrosyl Fluoride market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Purity and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Nitrosyl Fluoride market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Nitrosyl Fluoride market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

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Global Nitrosyl Fluoride market size and forecasts, by Purity and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Nitrosyl Fluoride market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Nitrosyl Fluoride

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Nitrosyl Fluoride market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Air Liquide, Resonac, Guangdong Huate Gas, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Nitrosyl Fluoride market is split by Purity and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Purity, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Purity

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?99%

?99.9%

Market segment by Grade

Industrial Grade

Electronic Grade

Market segment by Application

Semiconductor Etch

Fluoroaromatic Synthesis

Others

Major players covered

Air Liquide

Resonac

Guangdong Huate Gas

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

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South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Nitrosyl Fluoride product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Nitrosyl Fluoride, with price, sales quantity, revenue, and global market share of Nitrosyl Fluoride from 2021 to 2026.

Chapter 3, the Nitrosyl Fluoride competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Nitrosyl Fluoride breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Purity and by Application, with sales market share and growth rate by Purity, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Nitrosyl Fluoride market forecast, by regions, by Purity, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Nitrosyl Fluoride.

Chapter 14 and 15, to describe Nitrosyl Fluoride sales channel, distributors, customers, research findings and conclusion.

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