

Global PFAS-Free Semiconductor Process Chemicals 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 PFAS-Free Semiconductor Process Chemicals market size was valued at US\$ 211 million in 2025 and is forecast to a readjusted size of US\$ 421 million by 2032 with a CAGR of 8.0% during review period.

PFAS-free semiconductor process chemicals are a class of high-purity functional materials used in wafer fabrication, lithographic patterning, wet processing, chemical mechanical planarization, and advanced packaging. Their core objective is to reduce or replace the use of per- and polyfluoroalkyl substances in semiconductor manufacturing while maintaining critical process performance, including resolution, line-edge roughness, coating uniformity, defect control, chemical resistance, thermal resistance, adhesion, and cleanliness. This product category includes PFAS-free or fluorine-free photoresists, photoacid generators, bottom and top antireflective coatings, EUV rinses, underlayer materials, photo-imageable dielectrics, photo-sensitive polyimides, temporary bonding adhesives, wet-etch protective coatings, cleaning solutions, development-related materials, and CMP auxiliary materials. The key technical focus is to replace conventional fluorinated additives with non-PFAS surfactant systems, fluorine-free PAGs, low-defect resin systems, high-purity solvents, and precision filtration control, while enabling mass-production adoption through customer process-window validation. Typical applications include advanced logic, mature-node processes, memory, automotive and industrial semiconductors, wafer-level packaging, panel-level packaging, RDL, copper pillar bumps, passivation and insulating layers, and display-related semiconductor processes. Major customers include wafer fabs, OSATs, advanced packaging houses, display device manufacturers, and collaborative material development platforms.

The industrial value of PFAS-free semiconductor process chemicals is shifting from isolated environmental substitution to manufacturing-system-level supply security. Semiconductor manufacturing has long relied on the low surface tension, thermal resistance, chemical resistance, and hydrophobic properties of PFAS, which play critical roles in photoresists, PAGs, BARCs, TARCes, rinses, wet chemicals, advanced packaging materials, and certain supporting processes by enabling coating uniformity, pattern stability, reaction control, defect suppression, and cleaning protection. As regulators, industry alliances, and downstream customers continue to strengthen PFAS identification, release monitoring, and substitution assessment, material suppliers must establish non-PFAS molecular design, formulation reconstruction, impurity control, and long-term supply capabilities without sacrificing yield, resolution, throughput, or reliability. Growth in this field will not depend on a single regulatory event, but rather on customer risk management, green manufacturing commitments, increasing process complexity, and supply chain resilience.

From an application-structure perspective, lithography materials remain the most closely watched direction for PFAS-free substitution, while advanced packaging and dielectric passivation materials are more likely to achieve earlier scaled adoption. EUV photoresists, ArF immersion photoresists, KrF photoresists, i-line thick-film photoresists, antireflective coatings, underlayer materials, and rinses correspond to different process nodes and performance constraints. EUV emphasizes resolution, line-edge roughness, and stochastic defects; ArF immersion places greater importance on watermark suppression, hydrophobic interfaces, and acid-diffusion control; and i-line thick-film photoresists focus more on thick-film formation, electroplating molds, RDL, and copper pillar bump compatibility. At the same time, PFAS-free dielectric materials, fluorine-free PSPI, and packaging photoresists can support passivation insulation, stress buffering, redistribution layers, and advanced packaging structure upgrades. Their qualification cycles are more closely aligned with packaging customers' material validation rhythm, giving them clearer near-term commercialization opportunities.

Future competition will center on three categories of capability. The first is foundational chemistry and molecular design, namely whether non-PFAS surfactant systems, fluorine-free PAGs, non-fluorinated resins, and high-purity solvent systems can replace traditional fluorinated additives while maintaining lithographic sensitivity, pattern quality, defect levels, and long-term storage stability. The second is customer co-validation capability, namely whether suppliers can complete lab trials, pilot runs, customer evaluations, and mass-production introductions within real wafer, packaging, and display process windows while avoiding production-line risks caused by material

substitution. The third is quality-system and global delivery capability, namely whether suppliers can meet semiconductor-grade requirements for metal ions, particles, moisture, batch consistency, and regional supply security. In the near term, PFAS-free materials will be adopted first in packaging, mature-node processes, selected auxiliary lithography materials, and customer-designated substitution scenarios. Over the medium to long term, as advanced lithography and wet-chemical substitution mature, the industry is expected to form a more complete portfolio of lower-environmental-burden process chemicals.

This report is a detailed and comprehensive analysis for global PFAS-Free Semiconductor Process Chemicals market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Exposure Technology 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 PFAS-Free Semiconductor Process Chemicals market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PFAS-Free Semiconductor Process Chemicals market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PFAS-Free Semiconductor Process Chemicals market size and forecasts, by Exposure Technology and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PFAS-Free Semiconductor Process Chemicals market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 PFAS-Free Semiconductor Process Chemicals

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 PFAS-Free Semiconductor Process Chemicals 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 Merck KGaA, Darmstadt, Germany, FUJIFILM Corporation, Brewer Science, Inc., Tokyo Ohka Kogyo Co., Ltd., JSR Corporation, Sumitomo Chemical Co., Ltd., Hubei Dinglong Co., Ltd., Merck Electronics Ltd. Japan, etc.

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

Market Segmentation

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

Market segment by Exposure Technology

EUV

ArF Immersion

Dry ArF

KrF

I-Line

Nanoimprint Lithography

Market segment by Process Position

Front-End Lithography

Front-End Wet Processing

Front-End Polishing

Back-End Packaging Lithography

Back-End Packaging Dielectrics

Back-End Temporary Bonding

Market segment by Material Form

Photoresist

Antireflective Coating

Underlayer Material

Rinse

Others

Market segment by Application

Advanced Logic Manufacturing

Mature-Node Manufacturing

Memory Manufacturing

Advanced Packaging Manufacturing

Others

Major players covered

Merck KGaA, Darmstadt, Germany

FUJIFILM Corporation

Brewer Science, Inc.

Tokyo Ohka Kogyo Co., Ltd.

JSR Corporation

Sumitomo Chemical Co., Ltd.

Hubei Dinglong Co., Ltd.

Merck Electronics Ltd. Japan

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)

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PFAS-Free Semiconductor Process Chemicals product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PFAS-Free Semiconductor Process Chemicals, with price, sales quantity, revenue, and global market share of PFAS-Free Semiconductor Process Chemicals from 2021 to 2026.

Chapter 3, the PFAS-Free Semiconductor Process Chemicals competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PFAS-Free Semiconductor Process Chemicals 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 Exposure Technology and by Application, with sales market share and growth rate by Exposure Technology, 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 PFAS-Free Semiconductor Process Chemicals market forecast, by regions, by Exposure Technology, 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 PFAS-Free Semiconductor Process Chemicals.

Chapter 14 and 15, to describe PFAS-Free Semiconductor Process Chemicals sales channel, distributors, customers, research findings and conclusion.

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