

Global PFAS-Free Semiconductor Process Chemicals Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PFAS-Free Semiconductor Process Chemicals market size is expected to reach \$ 421 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

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, TARCs, 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 studies the global PFAS-Free Semiconductor Process Chemicals production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PFAS-Free Semiconductor Process Chemicals and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of PFAS-Free Semiconductor Process Chemicals that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PFAS-Free Semiconductor Process Chemicals total production and demand, 2021-2032, (Tons)

Global PFAS-Free Semiconductor Process Chemicals total production value, 2021-2032, (USD Million)

Global PFAS-Free Semiconductor Process Chemicals production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global PFAS-Free Semiconductor Process Chemicals consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: PFAS-Free Semiconductor Process Chemicals domestic production, consumption, key domestic manufacturers and share

Global PFAS-Free Semiconductor Process Chemicals production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global PFAS-Free Semiconductor Process Chemicals production by Exposure Technology, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global PFAS-Free Semiconductor Process Chemicals production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global PFAS-Free Semiconductor Process Chemicals market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PFAS-Free Semiconductor Process Chemicals market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Exposure Technology, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global PFAS-Free Semiconductor Process Chemicals Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PFAS-Free Semiconductor Process Chemicals Market, Segmentation by

Global PFAS-Free Semiconductor Process Chemicals Supply, Demand and Key Producers, 2026-2032

Exposure Technology:

EUV

ArF Immersion

Dry ArF

KrF

I-Line

Nanoimprint Lithography

Global PFAS-Free Semiconductor Process Chemicals Market, Segmentation 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

Global PFAS-Free Semiconductor Process Chemicals Market, Segmentation by Material Form:

Photoresist

Antireflective Coating

Underlayer Material

Rinse

Others

Global PFAS-Free Semiconductor Process Chemicals Market, Segmentation by Application:

Advanced Logic Manufacturing

Mature-Node Manufacturing

Memory Manufacturing

Advanced Packaging Manufacturing

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global PFAS-Free Semiconductor Process Chemicals market?
2. What is the demand of the global PFAS-Free Semiconductor Process Chemicals market?
3. What is the year over year growth of the global PFAS-Free Semiconductor Process Chemicals market?
4. What is the production and production value of the global PFAS-Free Semiconductor Process Chemicals market?
5. Who are the key producers in the global PFAS-Free Semiconductor Process Chemicals market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

1.1 PFAS-Free Semiconductor Process Chemicals Introduction

1.2 World PFAS-Free Semiconductor Process Chemicals Supply & Forecast

1.2.1 World PFAS-Free Semiconductor Process Chemicals Production Value (2021 & 2025 & 2032)

1.2.2 World PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.2.3 World PFAS-Free Semiconductor Process Chemicals Pricing Trends (2021-2032)

1.3 World PFAS-Free Semiconductor Process Chemicals Production by Region (Based on Production Site)

1.3.1 World PFAS-Free Semiconductor Process Chemicals Production Value by Region (2021-2032)

1.3.2 World PFAS-Free Semiconductor Process Chemicals Production by Region (2021-2032)

1.3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Region (2021-2032)

1.3.4 North America PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.3.5 Europe PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.3.6 China PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.3.7 Japan PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.3.8 India PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.3.9 Southeast Asia PFAS-Free Semiconductor Process Chemicals Production (2021-2032)

1.4 Market Drivers, Restraints and Trends

1.4.1 PFAS-Free Semiconductor Process Chemicals Market Drivers

1.4.2 Factors Affecting Demand

1.4.3 PFAS-Free Semiconductor Process Chemicals Major Market Trends

2 DEMAND SUMMARY

2.1 World PFAS-Free Semiconductor Process Chemicals Demand (2021-2032)

2.2 World PFAS-Free Semiconductor Process Chemicals Consumption by Region

2.2.1 World PFAS-Free Semiconductor Process Chemicals Consumption by Region (2021-2026)

2.2.2 World PFAS-Free Semiconductor Process Chemicals Consumption Forecast by

Region (2027-2032)

2.3 United States PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.4 China PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.5 Europe PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.6 Japan PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.7 South Korea PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.8 ASEAN PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

2.9 India PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World PFAS-Free Semiconductor Process Chemicals Production Value by Manufacturer (2021-2026)

3.2 World PFAS-Free Semiconductor Process Chemicals Production by Manufacturer (2021-2026)

3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Manufacturer (2021-2026)

3.4 PFAS-Free Semiconductor Process Chemicals Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global PFAS-Free Semiconductor Process Chemicals Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for PFAS-Free Semiconductor Process Chemicals in 2025

3.5.3 Global Concentration Ratios (CR8) for PFAS-Free Semiconductor Process Chemicals in 2025

3.6 PFAS-Free Semiconductor Process Chemicals Market: Overall Company Footprint Analysis

3.6.1 PFAS-Free Semiconductor Process Chemicals Market: Region Footprint

3.6.2 PFAS-Free Semiconductor Process Chemicals Market: Company Product Type Footprint

3.6.3 PFAS-Free Semiconductor Process Chemicals Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Value Comparison

4.1.1 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Comparison

4.2.1 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: PFAS-Free Semiconductor Process Chemicals Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: PFAS-Free Semiconductor Process Chemicals Consumption Comparison

4.3.1 United States VS China: PFAS-Free Semiconductor Process Chemicals Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: PFAS-Free Semiconductor Process Chemicals Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based PFAS-Free Semiconductor Process Chemicals Manufacturers and Market Share, 2021-2026

4.4.1 United States Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value (2021-2026)

4.4.3 United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production (2021-2026)

4.5 China Based PFAS-Free Semiconductor Process Chemicals Manufacturers and Market Share

4.5.1 China Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value (2021-2026)

4.5.3 China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production (2021-2026)

4.6 Rest of World Based PFAS-Free Semiconductor Process Chemicals Manufacturers

and Market Share, 2021-2026

- 4.6.1 Rest of World Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (State, Country)
- 4.6.2 Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value (2021-2026)
- 4.6.3 Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production (2021-2026)

5 MARKET ANALYSIS BY EXPOSURE TECHNOLOGY

- 5.1 World PFAS-Free Semiconductor Process Chemicals Market Size Overview by Exposure Technology: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Exposure Technology
 - 5.2.1 EUV
 - 5.2.2 ArF Immersion
 - 5.2.3 Dry ArF
 - 5.2.4 KrF
 - 5.2.5 I-Line
 - 5.2.6 Nanoimprint Lithography
- 5.3 Market Segment by Exposure Technology
 - 5.3.1 World PFAS-Free Semiconductor Process Chemicals Production by Exposure Technology (2021-2032)
 - 5.3.2 World PFAS-Free Semiconductor Process Chemicals Production Value by Exposure Technology (2021-2032)
 - 5.3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Exposure Technology (2021-2032)

6 MARKET ANALYSIS BY PROCESS POSITION

- 6.1 World PFAS-Free Semiconductor Process Chemicals Market Size Overview by Process Position: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Process Position
 - 6.2.1 Front-End Lithography
 - 6.2.2 Front-End Wet Processing
 - 6.2.3 Front-End Polishing
 - 6.2.4 Back-End Packaging Lithography
 - 6.2.5 Back-End Packaging Dielectrics
 - 6.2.6 Back-End Temporary Bonding
- 6.3 Market Segment by Process Position

6.3.1 World PFAS-Free Semiconductor Process Chemicals Production by Process Position (2021-2032)

6.3.2 World PFAS-Free Semiconductor Process Chemicals Production Value by Process Position (2021-2032)

6.3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Process Position (2021-2032)

7 MARKET ANALYSIS BY MATERIAL FORM

7.1 World PFAS-Free Semiconductor Process Chemicals Market Size Overview by Material Form: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Material Form

7.2.1 Photoresist

7.2.2 Antireflective Coating

7.2.3 Underlayer Material

7.2.4 Rinse

7.2.5 Others

7.3 Market Segment by Material Form

7.3.1 World PFAS-Free Semiconductor Process Chemicals Production by Material Form (2021-2032)

7.3.2 World PFAS-Free Semiconductor Process Chemicals Production Value by Material Form (2021-2032)

7.3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Material Form (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World PFAS-Free Semiconductor Process Chemicals Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Advanced Logic Manufacturing

8.2.2 Mature-Node Manufacturing

8.2.3 Memory Manufacturing

8.2.4 Advanced Packaging Manufacturing

8.2.5 Others

8.3 Market Segment by Application

8.3.1 World PFAS-Free Semiconductor Process Chemicals Production by Application (2021-2032)

8.3.2 World PFAS-Free Semiconductor Process Chemicals Production Value by

Application (2021-2032)

8.3.3 World PFAS-Free Semiconductor Process Chemicals Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Merck KGaA, Darmstadt, Germany

9.1.1 Merck KGaA, Darmstadt, Germany Details

9.1.2 Merck KGaA, Darmstadt, Germany Major Business

9.1.3 Merck KGaA, Darmstadt, Germany PFAS-Free Semiconductor Process Chemicals Product and Services

9.1.4 Merck KGaA, Darmstadt, Germany PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Merck KGaA, Darmstadt, Germany Recent Developments/Updates

9.1.6 Merck KGaA, Darmstadt, Germany Competitive Strengths & Weaknesses

9.2 FUJIFILM Corporation

9.2.1 FUJIFILM Corporation Details

9.2.2 FUJIFILM Corporation Major Business

9.2.3 FUJIFILM Corporation PFAS-Free Semiconductor Process Chemicals Product and Services

9.2.4 FUJIFILM Corporation PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 FUJIFILM Corporation Recent Developments/Updates

9.2.6 FUJIFILM Corporation Competitive Strengths & Weaknesses

9.3 Brewer Science, Inc.

9.3.1 Brewer Science, Inc. Details

9.3.2 Brewer Science, Inc. Major Business

9.3.3 Brewer Science, Inc. PFAS-Free Semiconductor Process Chemicals Product and Services

9.3.4 Brewer Science, Inc. PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Brewer Science, Inc. Recent Developments/Updates

9.3.6 Brewer Science, Inc. Competitive Strengths & Weaknesses

9.4 Tokyo Ohka Kogyo Co., Ltd.

9.4.1 Tokyo Ohka Kogyo Co., Ltd. Details

9.4.2 Tokyo Ohka Kogyo Co., Ltd. Major Business

9.4.3 Tokyo Ohka Kogyo Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

9.4.4 Tokyo Ohka Kogyo Co., Ltd. PFAS-Free Semiconductor Process Chemicals

Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Tokyo Ohka Kogyo Co., Ltd. Recent Developments/Updates

9.4.6 Tokyo Ohka Kogyo Co., Ltd. Competitive Strengths & Weaknesses

9.5 JSR Corporation

9.5.1 JSR Corporation Details

9.5.2 JSR Corporation Major Business

9.5.3 JSR Corporation PFAS-Free Semiconductor Process Chemicals Product and Services

9.5.4 JSR Corporation PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 JSR Corporation Recent Developments/Updates

9.5.6 JSR Corporation Competitive Strengths & Weaknesses

9.6 Sumitomo Chemical Co., Ltd.

9.6.1 Sumitomo Chemical Co., Ltd. Details

9.6.2 Sumitomo Chemical Co., Ltd. Major Business

9.6.3 Sumitomo Chemical Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

9.6.4 Sumitomo Chemical Co., Ltd. PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Sumitomo Chemical Co., Ltd. Recent Developments/Updates

9.6.6 Sumitomo Chemical Co., Ltd. Competitive Strengths & Weaknesses

9.7 Hubei Dinglong Co., Ltd.

9.7.1 Hubei Dinglong Co., Ltd. Details

9.7.2 Hubei Dinglong Co., Ltd. Major Business

9.7.3 Hubei Dinglong Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

9.7.4 Hubei Dinglong Co., Ltd. PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Hubei Dinglong Co., Ltd. Recent Developments/Updates

9.7.6 Hubei Dinglong Co., Ltd. Competitive Strengths & Weaknesses

9.8 Merck Electronics Ltd. Japan

9.8.1 Merck Electronics Ltd. Japan Details

9.8.2 Merck Electronics Ltd. Japan Major Business

9.8.3 Merck Electronics Ltd. Japan PFAS-Free Semiconductor Process Chemicals Product and Services

9.8.4 Merck Electronics Ltd. Japan PFAS-Free Semiconductor Process Chemicals Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Merck Electronics Ltd. Japan Recent Developments/Updates

9.8.6 Merck Electronics Ltd. Japan Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 PFAS-Free Semiconductor Process Chemicals Industry Chain

10.2 PFAS-Free Semiconductor Process Chemicals Upstream Analysis

10.2.1 PFAS-Free Semiconductor Process Chemicals Core Raw Materials

10.2.2 Main Manufacturers of PFAS-Free Semiconductor Process Chemicals Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 PFAS-Free Semiconductor Process Chemicals Production Mode

10.6 PFAS-Free Semiconductor Process Chemicals Procurement Model

10.7 PFAS-Free Semiconductor Process Chemicals Industry Sales Model and Sales Channels

10.7.1 PFAS-Free Semiconductor Process Chemicals Sales Model

10.7.2 PFAS-Free Semiconductor Process Chemicals Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World PFAS-Free Semiconductor Process Chemicals Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World PFAS-Free Semiconductor Process Chemicals Production Value by Region (2021-2026) & (USD Million)

Table 3. World PFAS-Free Semiconductor Process Chemicals Production Value by Region (2027-2032) & (USD Million)

Table 4. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Region (2021-2026)

Table 5. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Region (2027-2032)

Table 6. World PFAS-Free Semiconductor Process Chemicals Production by Region (2021-2026) & (Tons)

Table 7. World PFAS-Free Semiconductor Process Chemicals Production by Region (2027-2032) & (Tons)

Table 8. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Region (2021-2026)

Table 9. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Region (2027-2032)

Table 10. World PFAS-Free Semiconductor Process Chemicals Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World PFAS-Free Semiconductor Process Chemicals Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. PFAS-Free Semiconductor Process Chemicals Major Market Trends

Table 13. World PFAS-Free Semiconductor Process Chemicals Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World PFAS-Free Semiconductor Process Chemicals Consumption by Region (2021-2026) & (Tons)

Table 15. World PFAS-Free Semiconductor Process Chemicals Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World PFAS-Free Semiconductor Process Chemicals Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key PFAS-Free Semiconductor Process Chemicals Producers in 2025

Table 18. World PFAS-Free Semiconductor Process Chemicals Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key PFAS-Free Semiconductor Process Chemicals Producers in 2025

Table 20. World PFAS-Free Semiconductor Process Chemicals Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global PFAS-Free Semiconductor Process Chemicals Company Evaluation Quadrant

Table 22. World PFAS-Free Semiconductor Process Chemicals Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and PFAS-Free Semiconductor Process Chemicals Production Site of Key Manufacturer

Table 24. PFAS-Free Semiconductor Process Chemicals Market: Company Product Type Footprint

Table 25. PFAS-Free Semiconductor Process Chemicals Market: Company Product Application Footprint

Table 26. PFAS-Free Semiconductor Process Chemicals Competitive Factors

Table 27. PFAS-Free Semiconductor Process Chemicals New Entrant and Capacity Expansion Plans

Table 28. PFAS-Free Semiconductor Process Chemicals Mergers & Acquisitions Activity

Table 29. United States VS China PFAS-Free Semiconductor Process Chemicals Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China PFAS-Free Semiconductor Process Chemicals Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China PFAS-Free Semiconductor Process Chemicals Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share (2021-2026)

Table 37. China Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share (2021-2026)

Table 42. Rest of World Based PFAS-Free Semiconductor Process Chemicals Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share (2021-2026)

Table 47. World PFAS-Free Semiconductor Process Chemicals Production Value by Exposure Technology, (USD Million), 2021 & 2025 & 2032

Table 48. World PFAS-Free Semiconductor Process Chemicals Production by Exposure Technology (2021-2026) & (Tons)

Table 49. World PFAS-Free Semiconductor Process Chemicals Production by Exposure Technology (2027-2032) & (Tons)

Table 50. World PFAS-Free Semiconductor Process Chemicals Production Value by Exposure Technology (2021-2026) & (USD Million)

Table 51. World PFAS-Free Semiconductor Process Chemicals Production Value by Exposure Technology (2027-2032) & (USD Million)

Table 52. World PFAS-Free Semiconductor Process Chemicals Average Price by Exposure Technology (2021-2026) & (US\$/Ton)

Table 53. World PFAS-Free Semiconductor Process Chemicals Average Price by Exposure Technology (2027-2032) & (US\$/Ton)

Table 54. World PFAS-Free Semiconductor Process Chemicals Production Value by Process Position, (USD Million), 2021 & 2025 & 2032

Table 55. World PFAS-Free Semiconductor Process Chemicals Production by Process Position (2021-2026) & (Tons)

Table 56. World PFAS-Free Semiconductor Process Chemicals Production by Process Position (2027-2032) & (Tons)

Table 57. World PFAS-Free Semiconductor Process Chemicals Production Value by Process Position (2021-2026) & (USD Million)

Table 58. World PFAS-Free Semiconductor Process Chemicals Production Value by

Process Position (2027-2032) & (USD Million)

Table 59. World PFAS-Free Semiconductor Process Chemicals Average Price by Process Position (2021-2026) & (US\$/Ton)

Table 60. World PFAS-Free Semiconductor Process Chemicals Average Price by Process Position (2027-2032) & (US\$/Ton)

Table 61. World PFAS-Free Semiconductor Process Chemicals Production Value by Material Form, (USD Million), 2021 & 2025 & 2032

Table 62. World PFAS-Free Semiconductor Process Chemicals Production by Material Form (2021-2026) & (Tons)

Table 63. World PFAS-Free Semiconductor Process Chemicals Production by Material Form (2027-2032) & (Tons)

Table 64. World PFAS-Free Semiconductor Process Chemicals Production Value by Material Form (2021-2026) & (USD Million)

Table 65. World PFAS-Free Semiconductor Process Chemicals Production Value by Material Form (2027-2032) & (USD Million)

Table 66. World PFAS-Free Semiconductor Process Chemicals Average Price by Material Form (2021-2026) & (US\$/Ton)

Table 67. World PFAS-Free Semiconductor Process Chemicals Average Price by Material Form (2027-2032) & (US\$/Ton)

Table 68. World PFAS-Free Semiconductor Process Chemicals Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World PFAS-Free Semiconductor Process Chemicals Production by Application (2021-2026) & (Tons)

Table 70. World PFAS-Free Semiconductor Process Chemicals Production by Application (2027-2032) & (Tons)

Table 71. World PFAS-Free Semiconductor Process Chemicals Production Value by Application (2021-2026) & (USD Million)

Table 72. World PFAS-Free Semiconductor Process Chemicals Production Value by Application (2027-2032) & (USD Million)

Table 73. World PFAS-Free Semiconductor Process Chemicals Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World PFAS-Free Semiconductor Process Chemicals Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Merck KGaA, Darmstadt, Germany Basic Information, Manufacturing Base and Competitors

Table 76. Merck KGaA, Darmstadt, Germany Major Business

Table 77. Merck KGaA, Darmstadt, Germany PFAS-Free Semiconductor Process Chemicals Product and Services

Table 78. Merck KGaA, Darmstadt, Germany PFAS-Free Semiconductor Process

Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Merck KGaA, Darmstadt, Germany Recent Developments/Updates

Table 80. Merck KGaA, Darmstadt, Germany Competitive Strengths & Weaknesses

Table 81. FUJIFILM Corporation Basic Information, Manufacturing Base and Competitors

Table 82. FUJIFILM Corporation Major Business

Table 83. FUJIFILM Corporation PFAS-Free Semiconductor Process Chemicals Product and Services

Table 84. FUJIFILM Corporation PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. FUJIFILM Corporation Recent Developments/Updates

Table 86. FUJIFILM Corporation Competitive Strengths & Weaknesses

Table 87. Brewer Science, Inc. Basic Information, Manufacturing Base and Competitors

Table 88. Brewer Science, Inc. Major Business

Table 89. Brewer Science, Inc. PFAS-Free Semiconductor Process Chemicals Product and Services

Table 90. Brewer Science, Inc. PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Brewer Science, Inc. Recent Developments/Updates

Table 92. Brewer Science, Inc. Competitive Strengths & Weaknesses

Table 93. Tokyo Ohka Kogyo Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 94. Tokyo Ohka Kogyo Co., Ltd. Major Business

Table 95. Tokyo Ohka Kogyo Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

Table 96. Tokyo Ohka Kogyo Co., Ltd. PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Tokyo Ohka Kogyo Co., Ltd. Recent Developments/Updates

Table 98. Tokyo Ohka Kogyo Co., Ltd. Competitive Strengths & Weaknesses

Table 99. JSR Corporation Basic Information, Manufacturing Base and Competitors

Table 100. JSR Corporation Major Business

Table 101. JSR Corporation PFAS-Free Semiconductor Process Chemicals Product and Services

Table 102. JSR Corporation PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 103. JSR Corporation Recent Developments/Updates

Table 104. JSR Corporation Competitive Strengths & Weaknesses

Table 105. Sumitomo Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 106. Sumitomo Chemical Co., Ltd. Major Business

Table 107. Sumitomo Chemical Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

Table 108. Sumitomo Chemical Co., Ltd. PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Sumitomo Chemical Co., Ltd. Recent Developments/Updates

Table 110. Sumitomo Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 111. Hubei Dinglong Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 112. Hubei Dinglong Co., Ltd. Major Business

Table 113. Hubei Dinglong Co., Ltd. PFAS-Free Semiconductor Process Chemicals Product and Services

Table 114. Hubei Dinglong Co., Ltd. PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Hubei Dinglong Co., Ltd. Recent Developments/Updates

Table 116. Hubei Dinglong Co., Ltd. Competitive Strengths & Weaknesses

Table 117. Merck Electronics Ltd. Japan Basic Information, Manufacturing Base and Competitors

Table 118. Merck Electronics Ltd. Japan Major Business

Table 119. Merck Electronics Ltd. Japan PFAS-Free Semiconductor Process Chemicals Product and Services

Table 120. Merck Electronics Ltd. Japan PFAS-Free Semiconductor Process Chemicals Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Merck Electronics Ltd. Japan Recent Developments/Updates

Table 122. Merck Electronics Ltd. Japan Competitive Strengths & Weaknesses

Table 123. Global Key Players of PFAS-Free Semiconductor Process Chemicals Upstream (Raw Materials)

Table 124. Global PFAS-Free Semiconductor Process Chemicals Typical Customers

Table 125. PFAS-Free Semiconductor Process Chemicals Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. PFAS-Free Semiconductor Process Chemicals Picture
- Figure 2. World PFAS-Free Semiconductor Process Chemicals Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World PFAS-Free Semiconductor Process Chemicals Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 5. World PFAS-Free Semiconductor Process Chemicals Average Price (2021-2032) & (US\$/Ton)
- Figure 6. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Region (2021-2032)
- Figure 7. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Region (2021-2032)
- Figure 8. North America PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 9. Europe PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 10. China PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 11. Japan PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 12. India PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 13. Southeast Asia PFAS-Free Semiconductor Process Chemicals Production (2021-2032) & (Tons)
- Figure 14. PFAS-Free Semiconductor Process Chemicals Market Drivers
- Figure 15. Factors Affecting Demand
- Figure 16. World PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)
- Figure 17. World PFAS-Free Semiconductor Process Chemicals Consumption Market Share by Region (2021-2032)
- Figure 18. United States PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)
- Figure 19. China PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 20. Europe PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 21. Japan PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 22. South Korea PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 23. ASEAN PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 24. India PFAS-Free Semiconductor Process Chemicals Consumption (2021-2032) & (Tons)

Figure 25. Producer Shipments of PFAS-Free Semiconductor Process Chemicals by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for PFAS-Free Semiconductor Process Chemicals Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for PFAS-Free Semiconductor Process Chemicals Markets in 2025

Figure 28. United States VS China: PFAS-Free Semiconductor Process Chemicals Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: PFAS-Free Semiconductor Process Chemicals Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: PFAS-Free Semiconductor Process Chemicals Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share 2025

Figure 32. China Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share 2025

Figure 33. Rest of World Based Manufacturers PFAS-Free Semiconductor Process Chemicals Production Market Share 2025

Figure 34. World PFAS-Free Semiconductor Process Chemicals Production Value by Exposure Technology, (USD Million), 2021 & 2025 & 2032

Figure 35. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Exposure Technology in 2025

Figure 36. EUV

Figure 37. ArF Immersion

Figure 38. Dry ArF

Figure 39. KrF

Figure 40. I-Line

Figure 41. Nanoimprint Lithography

Figure 42. World PFAS-Free Semiconductor Process Chemicals Production Market

Share by Exposure Technology (2021-2032)

Figure 43. World PFAS-Free Semiconductor Process Chemicals Production Value

Market Share by Exposure Technology (2021-2032)

Figure 44. World PFAS-Free Semiconductor Process Chemicals Average Price by Exposure Technology (2021-2032) & (US\$/Ton)

Figure 45. World PFAS-Free Semiconductor Process Chemicals Production Value by Process Position, (USD Million), 2021 & 2025 & 2032

Figure 46. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Process Position in 2025

Figure 47. Front-End Lithography

Figure 48. Front-End Wet Processing

Figure 49. Front-End Polishing

Figure 50. Back-End Packaging Lithography

Figure 51. Back-End Packaging Dielectrics

Figure 52. Back-End Temporary Bonding

Figure 53. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Process Position (2021-2032)

Figure 54. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Process Position (2021-2032)

Figure 55. World PFAS-Free Semiconductor Process Chemicals Average Price by Process Position (2021-2032) & (US\$/Ton)

Figure 56. World PFAS-Free Semiconductor Process Chemicals Production Value by Material Form, (USD Million), 2021 & 2025 & 2032

Figure 57. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Material Form in 2025

Figure 58. Photoresist

Figure 59. Antireflective Coating

Figure 60. Underlayer Material

Figure 61. Rinse

Figure 62. Others

Figure 63. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Material Form (2021-2032)

Figure 64. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Material Form (2021-2032)

Figure 65. World PFAS-Free Semiconductor Process Chemicals Average Price by Material Form (2021-2032) & (US\$/Ton)

Figure 66. World PFAS-Free Semiconductor Process Chemicals Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 67. World PFAS-Free Semiconductor Process Chemicals Production Value

Market Share by Application in 2025

Figure 68. Advanced Logic Manufacturing

Figure 69. Mature-Node Manufacturing

Figure 70. Memory Manufacturing

Figure 71. Advanced Packaging Manufacturing

Figure 72. Others

Figure 73. World PFAS-Free Semiconductor Process Chemicals Production Market Share by Application (2021-2032)

Figure 74. World PFAS-Free Semiconductor Process Chemicals Production Value Market Share by Application (2021-2032)

Figure 75. World PFAS-Free Semiconductor Process Chemicals Average Price by Application (2021-2032) & (US\$/Ton)

Figure 76. PFAS-Free Semiconductor Process Chemicals Industry Chain

Figure 77. PFAS-Free Semiconductor Process Chemicals Procurement Model

Figure 78. PFAS-Free Semiconductor Process Chemicals Sales Model

Figure 79. PFAS-Free Semiconductor Process Chemicals Sales Channels, Direct Sales, and Distribution

Figure 80. Methodology

Figure 81. Research Process and Data Source

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