

Global Radiation-Hardened Electronic Material 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 Radiation-Hardened Electronic Material market size was valued at US\$ 1914 million in 2025 and is forecast to a readjusted size of US\$ 3396 million by 2032 with a CAGR of 8.5% during review period.

Radiation-Hardened Electronic Materials are high-reliability physical materials designed for electronic systems operating in radiation-intensive and mission-critical environments. The category mainly serves satellite electronics, space payloads, deep-space probes, nuclear industry electronics, particle detection systems, defense electronics, high-reliability communications, and aerospace control systems. The core property of these materials is their ability to maintain stable electrical, thermal, dielectric, mechanical, and protective performance under total ionizing dose, single-event effects, displacement damage, proton, electron, neutron, gamma-ray exposure, vacuum thermal cycling, and severe electromagnetic interference. The research scope mainly covers radiation-hardened or radiation-tolerant semiconductor substrates and epitaxial materials, space-grade polyimide films, high-reliability printed circuit board base materials, low-outgassing encapsulants, potting compounds, conformal coatings, ceramic packaging substrates, thermally conductive insulating materials, electromagnetic shielding materials, and radiation shielding composites. Major product forms include wafers, epitaxial wafers, films, laminates, copper-clad laminates, adhesives, encapsulation compounds, coating materials, ceramic sheets, composite sheets, and shielding gaskets. Key manufacturing processes include SOI wafer preparation, epitaxial growth, crystal growth, ion implantation, chemical imidization, biaxial stretching, resin modification, low-outgassing curing, ceramic sintering, metal-filled composite processing, conductive filler dispersion, and surface treatment. Important technical

parameters generally include total ionizing dose tolerance, low-outgassing performance, dielectric constant, dissipation factor, thermal conductivity, volume resistivity, breakdown strength, coefficient of thermal expansion, thickness uniformity, wafer bow, cleanliness, and lot-to-lot consistency. The essential function of these materials is to improve the service life, operational stability, signal integrity, insulation reliability, thermal management, and packaging robustness of electronic devices, electronic modules, and interconnect systems exposed to radiation, vacuum, temperature cycling, and strong interference. On a revenue-weighted standard material equivalent basis, the 2025 global average industry price of Radiation-Hardened Electronic Materials is estimated at about USD 305 per kilogram, and the 2025 global average gross margin is estimated at about 42.00%.

The upstream value chain of Radiation-Hardened Electronic Materials is built on high-purity silicon, silicon carbide crystals, gallium, arsenic, indium, polyimide monomers, specialty resins, ceramic powders, metallic fillers, conductive fillers, siloxanes, and functional additives. The midstream segment covers wafer and epitaxial wafer manufacturing, polyimide film processing, high-reliability circuit substrate lamination, low-outgassing encapsulant formulation, ceramic package sintering, shielding composite processing, and electronic protection material production. The downstream market is concentrated in satellite platforms, space payloads, nuclear industry electronics, high-energy physics detectors, defense electronics, and aerospace electronic systems that require long-term reliability under radiation and harsh operating conditions.

The competitive structure is characterized by multiple material systems rather than a single homogeneous product category. Semiconductor substrates and epitaxial materials, polyimide films, high-reliability PCB base materials, packaging protection materials, ceramic package materials, and shielding materials serve different technical functions, while jointly improving the reliability of electronics used in radiation environments. North America remains strong in space-grade encapsulation, wide-bandgap materials, EMI shielding, and high-reliability electronic materials. Japan has deep capabilities in polyimide films, ceramic packaging, and electronic resins. Europe has a solid position in SOI, specialty silicon wafers, advanced ceramics, and high-performance engineered materials. China is accelerating its presence in SOI, SiC, polyimide films, and electronic packaging materials.

In terms of application structure, satellite electronics and space payloads form the most visible and stable demand base. Low Earth orbit constellations, remote sensing satellites, communication satellites, navigation enhancement systems, deep-space missions, and space science programs are increasing requirements for batch

consistency, traceability, and long-cycle material reliability. Nuclear industry electronics and high-energy physics facilities are smaller in volume but have stricter requirements for radiation stability, long-term durability, and customized qualification. Defense electronics place greater emphasis on supply chain security, local sourcing, and mission assurance, shifting competition from individual material performance toward reliability data, qualification history, process consistency, and secure delivery capability.

The policy and capital environment is reinforcing the strategic role of this industry. Semiconductor supply chain security, national space programs, commercial space expansion, nuclear infrastructure upgrades, and defense electronics modernization are encouraging regionalized material supply and localized production. Global semiconductor sales and silicon wafer shipments remain at a high level, while the space economy continues to expand, creating a long-term demand base for radiation-hardened electronic materials. At the same time, industry consolidation, electronic materials business restructuring, wide-bandgap material capacity expansion, new space-grade adhesive products, and investment in high-reliability electronic substrates are reshaping regional supply structures and raising entry barriers for new participants.

This report is a detailed and comprehensive analysis for global Radiation-Hardened Electronic Material market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Radiation-Hardened Electronic Material market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/kg), 2021-2032

Global Radiation-Hardened Electronic Material market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/kg), 2021-2032

Global Radiation-Hardened Electronic Material market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/kg), 2021-2032

Global Radiation-Hardened Electronic Material market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), 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 Radiation-Hardened Electronic Material

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 Radiation-Hardened Electronic Material 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 Soitec, GlobalWafers Co., Ltd., SUMCO Corporation, Okmetic Oy, Shanghai Simgui Technology Co., Ltd., Zhonghuan Advanced Semiconductor Materials Co., Ltd., Wolfspeed, Inc., Coherent Corp., SK siltron css, onsemi, etc.

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

Market Segmentation

Radiation-Hardened Electronic Material market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

Wafers and Substrates

Epitaxial Wafers

Films

Laminates and Copper-clad Laminates

Adhesives and Encapsulants

Conformal Coatings

Others

Market segment by Radiation Reliability Requirement

Total Ionizing Dose Resistant

Single Event Effect Mitigation

Displacement Damage Resistant

Low Outgassing Space-grade Materials

Environmental Reliability Support Materials

Others

Market segment by Application

Satellite Platform Electronics

Space Payload Electronics

Deep Space and Space Science Systems

Nuclear Industry Electronics

Particle Detection and Research Electronics

Defense and Strategic Electronics

Aerospace Avionics

Others

Major players covered

Soitec

GlobalWafers Co., Ltd.

SUMCO Corporation

Okmetic Oy

Shanghai Simgui Technology Co., Ltd.

Zhonghuan Advanced Semiconductor Materials Co., Ltd.

Wolfspeed, Inc.

Coherent Corp.

SK siltron css

onsemi

SICC Co., Ltd.

Tankeblue Semiconductor Co., Ltd.

Sanan Semiconductor Co., Ltd.

AXT, Inc.

Freiberger Compound Materials GmbH

Sumitomo Electric Industries, Ltd.

IQE plc

Qnity Electronics, Inc.

UBE Corporation

Kaneka Corporation

PI Advanced Materials Co., Ltd.

Shenzhen Rayitek Hi-Tech Film Co., Ltd.

Zhuzhou Times Huaxin New Material Technology Co., Ltd.

Arlon Electronic Materials

Rogers Corporation

Isola Group

Panasonic Holdings Corporation

Dow Inc.

Momentive Performance Materials Inc.

Avantor, Inc.

Wacker Chemie AG

Henkel AG & Co. KGaA

Shin-Etsu Chemical Co., Ltd.

3M Company

Parker Hannifin Corporation

Laird Performance Materials

Heraeus Holding GmbH

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 Radiation-Hardened Electronic Material product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Radiation-Hardened Electronic Material, with price, sales quantity, revenue, and global market share of Radiation-Hardened Electronic Material from 2021 to 2026.

Chapter 3, the Radiation-Hardened Electronic Material competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Radiation-Hardened Electronic Material 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 Type and by Application, with sales market

share and growth rate by Type, 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 Radiation-Hardened Electronic Material market forecast, by regions, by Type, 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 Radiation-Hardened Electronic Material.

Chapter 14 and 15, to describe Radiation-Hardened Electronic Material sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Radiation-Hardened Electronic Material Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Wafers and Substrates

1.3.3 Epitaxial Wafers

1.3.4 Films

1.3.5 Laminates and Copper-clad Laminates

1.3.6 Adhesives and Encapsulants

1.3.7 Conformal Coatings

1.3.8 Others

1.4 Market Analysis by Radiation Reliability Requirement

1.4.1 Overview: Global Radiation-Hardened Electronic Material Consumption Value by Radiation Reliability Requirement: 2021 Versus 2025 Versus 2032

1.4.2 Total Ionizing Dose Resistant

1.4.3 Single Event Effect Mitigation

1.4.4 Displacement Damage Resistant

1.4.5 Low Outgassing Space-grade Materials

1.4.6 Environmental Reliability Support Materials

1.4.7 Others

1.5 Market Analysis by Application

1.5.1 Overview: Global Radiation-Hardened Electronic Material Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.5.2 Satellite Platform Electronics

1.5.3 Space Payload Electronics

1.5.4 Deep Space and Space Science Systems

1.5.5 Nuclear Industry Electronics

1.5.6 Particle Detection and Research Electronics

1.5.7 Defense and Strategic Electronics

1.5.8 Aerospace Avionics

1.5.9 Others

1.6 Global Radiation-Hardened Electronic Material Market Size & Forecast

1.6.1 Global Radiation-Hardened Electronic Material Consumption Value (2021 & 2025 & 2032)

- 1.6.2 Global Radiation-Hardened Electronic Material Sales Quantity (2021-2032)
- 1.6.3 Global Radiation-Hardened Electronic Material Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Soitec

- 2.1.1 Soitec Details
- 2.1.2 Soitec Major Business
- 2.1.3 Soitec Radiation-Hardened Electronic Material Product and Services
- 2.1.4 Soitec Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.1.5 Soitec Recent Developments/Updates

2.2 GlobalWafers Co., Ltd.

- 2.2.1 GlobalWafers Co., Ltd. Details
- 2.2.2 GlobalWafers Co., Ltd. Major Business
- 2.2.3 GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Product and Services
- 2.2.4 GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.2.5 GlobalWafers Co., Ltd. Recent Developments/Updates

2.3 SUMCO Corporation

- 2.3.1 SUMCO Corporation Details
- 2.3.2 SUMCO Corporation Major Business
- 2.3.3 SUMCO Corporation Radiation-Hardened Electronic Material Product and Services
- 2.3.4 SUMCO Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.3.5 SUMCO Corporation Recent Developments/Updates

2.4 Okmetic Oy

- 2.4.1 Okmetic Oy Details
- 2.4.2 Okmetic Oy Major Business
- 2.4.3 Okmetic Oy Radiation-Hardened Electronic Material Product and Services
- 2.4.4 Okmetic Oy Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.4.5 Okmetic Oy Recent Developments/Updates

2.5 Shanghai Simgui Technology Co., Ltd.

- 2.5.1 Shanghai Simgui Technology Co., Ltd. Details
- 2.5.2 Shanghai Simgui Technology Co., Ltd. Major Business
- 2.5.3 Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material

Product and Services

2.5.4 Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Shanghai Simgui Technology Co., Ltd. Recent Developments/Updates

2.6 Zhonghuan Advanced Semiconductor Materials Co., Ltd.

2.6.1 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Details

2.6.2 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Major Business

2.6.3 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Product and Services

2.6.4 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Recent Developments/Updates

2.7 Wolfspeed, Inc.

2.7.1 Wolfspeed, Inc. Details

2.7.2 Wolfspeed, Inc. Major Business

2.7.3 Wolfspeed, Inc. Radiation-Hardened Electronic Material Product and Services

2.7.4 Wolfspeed, Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Wolfspeed, Inc. Recent Developments/Updates

2.8 Coherent Corp.

2.8.1 Coherent Corp. Details

2.8.2 Coherent Corp. Major Business

2.8.3 Coherent Corp. Radiation-Hardened Electronic Material Product and Services

2.8.4 Coherent Corp. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Coherent Corp. Recent Developments/Updates

2.9 SK siltron css

2.9.1 SK siltron css Details

2.9.2 SK siltron css Major Business

2.9.3 SK siltron css Radiation-Hardened Electronic Material Product and Services

2.9.4 SK siltron css Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 SK siltron css Recent Developments/Updates

2.10 onsemi

2.10.1 onsemi Details

2.10.2 onsemi Major Business

2.10.3 onsemi Radiation-Hardened Electronic Material Product and Services

- 2.10.4 onsemi Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.10.5 onsemi Recent Developments/Updates
- 2.11 SICC Co., Ltd.
 - 2.11.1 SICC Co., Ltd. Details
 - 2.11.2 SICC Co., Ltd. Major Business
 - 2.11.3 SICC Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.11.4 SICC Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 SICC Co., Ltd. Recent Developments/Updates
- 2.12 Tankeblue Semiconductor Co., Ltd.
 - 2.12.1 Tankeblue Semiconductor Co., Ltd. Details
 - 2.12.2 Tankeblue Semiconductor Co., Ltd. Major Business
 - 2.12.3 Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.12.4 Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 Tankeblue Semiconductor Co., Ltd. Recent Developments/Updates
- 2.13 Sanan Semiconductor Co., Ltd.
 - 2.13.1 Sanan Semiconductor Co., Ltd. Details
 - 2.13.2 Sanan Semiconductor Co., Ltd. Major Business
 - 2.13.3 Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.13.4 Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 Sanan Semiconductor Co., Ltd. Recent Developments/Updates
- 2.14 AXT, Inc.
 - 2.14.1 AXT, Inc. Details
 - 2.14.2 AXT, Inc. Major Business
 - 2.14.3 AXT, Inc. Radiation-Hardened Electronic Material Product and Services
 - 2.14.4 AXT, Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.14.5 AXT, Inc. Recent Developments/Updates
- 2.15 Freiberger Compound Materials GmbH
 - 2.15.1 Freiberger Compound Materials GmbH Details
 - 2.15.2 Freiberger Compound Materials GmbH Major Business
 - 2.15.3 Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material Product and Services
 - 2.15.4 Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material

Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Freiburger Compound Materials GmbH Recent Developments/Updates

2.16 Sumitomo Electric Industries, Ltd.

2.16.1 Sumitomo Electric Industries, Ltd. Details

2.16.2 Sumitomo Electric Industries, Ltd. Major Business

2.16.3 Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material

Product and Services

2.16.4 Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material

Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 Sumitomo Electric Industries, Ltd. Recent Developments/Updates

2.17 IQE plc

2.17.1 IQE plc Details

2.17.2 IQE plc Major Business

2.17.3 IQE plc Radiation-Hardened Electronic Material Product and Services

2.17.4 IQE plc Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 IQE plc Recent Developments/Updates

2.18 Qnity Electronics, Inc.

2.18.1 Qnity Electronics, Inc. Details

2.18.2 Qnity Electronics, Inc. Major Business

2.18.3 Qnity Electronics, Inc. Radiation-Hardened Electronic Material Product and Services

2.18.4 Qnity Electronics, Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Qnity Electronics, Inc. Recent Developments/Updates

2.19 UBE Corporation

2.19.1 UBE Corporation Details

2.19.2 UBE Corporation Major Business

2.19.3 UBE Corporation Radiation-Hardened Electronic Material Product and Services

2.19.4 UBE Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 UBE Corporation Recent Developments/Updates

2.20 Kaneka Corporation

2.20.1 Kaneka Corporation Details

2.20.2 Kaneka Corporation Major Business

2.20.3 Kaneka Corporation Radiation-Hardened Electronic Material Product and Services

2.20.4 Kaneka Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.20.5 Kaneka Corporation Recent Developments/Updates
- 2.21 PI Advanced Materials Co., Ltd.
 - 2.21.1 PI Advanced Materials Co., Ltd. Details
 - 2.21.2 PI Advanced Materials Co., Ltd. Major Business
 - 2.21.3 PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.21.4 PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.21.5 PI Advanced Materials Co., Ltd. Recent Developments/Updates
- 2.22 Shenzhen Rayitek Hi-Tech Film Co., Ltd.
 - 2.22.1 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Details
 - 2.22.2 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Major Business
 - 2.22.3 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.22.4 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.22.5 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Recent Developments/Updates
- 2.23 Zhuzhou Times Huaxin New Material Technology Co., Ltd.
 - 2.23.1 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Details
 - 2.23.2 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Major Business
 - 2.23.3 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Product and Services
 - 2.23.4 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.23.5 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Recent Developments/Updates
- 2.24 Arlon Electronic Materials
 - 2.24.1 Arlon Electronic Materials Details
 - 2.24.2 Arlon Electronic Materials Major Business
 - 2.24.3 Arlon Electronic Materials Radiation-Hardened Electronic Material Product and Services
 - 2.24.4 Arlon Electronic Materials Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.24.5 Arlon Electronic Materials Recent Developments/Updates
- 2.25 Rogers Corporation
 - 2.25.1 Rogers Corporation Details
 - 2.25.2 Rogers Corporation Major Business

2.25.3 Rogers Corporation Radiation-Hardened Electronic Material Product and Services

2.25.4 Rogers Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 Rogers Corporation Recent Developments/Updates

2.26 Isola Group

2.26.1 Isola Group Details

2.26.2 Isola Group Major Business

2.26.3 Isola Group Radiation-Hardened Electronic Material Product and Services

2.26.4 Isola Group Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 Isola Group Recent Developments/Updates

2.27 Panasonic Holdings Corporation

2.27.1 Panasonic Holdings Corporation Details

2.27.2 Panasonic Holdings Corporation Major Business

2.27.3 Panasonic Holdings Corporation Radiation-Hardened Electronic Material Product and Services

2.27.4 Panasonic Holdings Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.27.5 Panasonic Holdings Corporation Recent Developments/Updates

2.28 Dow Inc.

2.28.1 Dow Inc. Details

2.28.2 Dow Inc. Major Business

2.28.3 Dow Inc. Radiation-Hardened Electronic Material Product and Services

2.28.4 Dow Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.28.5 Dow Inc. Recent Developments/Updates

2.29 Momentive Performance Materials Inc.

2.29.1 Momentive Performance Materials Inc. Details

2.29.2 Momentive Performance Materials Inc. Major Business

2.29.3 Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Product and Services

2.29.4 Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.29.5 Momentive Performance Materials Inc. Recent Developments/Updates

2.30 Avantor, Inc.

2.30.1 Avantor, Inc. Details

2.30.2 Avantor, Inc. Major Business

2.30.3 Avantor, Inc. Radiation-Hardened Electronic Material Product and Services

2.30.4 Avantor, Inc. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.30.5 Avantor, Inc. Recent Developments/Updates

2.31 Wacker Chemie AG

2.31.1 Wacker Chemie AG Details

2.31.2 Wacker Chemie AG Major Business

2.31.3 Wacker Chemie AG Radiation-Hardened Electronic Material Product and Services

2.31.4 Wacker Chemie AG Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.31.5 Wacker Chemie AG Recent Developments/Updates

2.32 Henkel AG & Co. KGaA

2.32.1 Henkel AG & Co. KGaA Details

2.32.2 Henkel AG & Co. KGaA Major Business

2.32.3 Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Product and Services

2.32.4 Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.32.5 Henkel AG & Co. KGaA Recent Developments/Updates

2.33 Shin-Etsu Chemical Co., Ltd.

2.33.1 Shin-Etsu Chemical Co., Ltd. Details

2.33.2 Shin-Etsu Chemical Co., Ltd. Major Business

2.33.3 Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Product and Services

2.33.4 Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.33.5 Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

2.34 3M Company

2.34.1 3M Company Details

2.34.2 3M Company Major Business

2.34.3 3M Company Radiation-Hardened Electronic Material Product and Services

2.34.4 3M Company Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.34.5 3M Company Recent Developments/Updates

2.35 Parker Hannifin Corporation

2.35.1 Parker Hannifin Corporation Details

2.35.2 Parker Hannifin Corporation Major Business

2.35.3 Parker Hannifin Corporation Radiation-Hardened Electronic Material Product and Services

2.35.4 Parker Hannifin Corporation Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.35.5 Parker Hannifin Corporation Recent Developments/Updates

2.36 Laird Performance Materials

2.36.1 Laird Performance Materials Details

2.36.2 Laird Performance Materials Major Business

2.36.3 Laird Performance Materials Radiation-Hardened Electronic Material Product and Services

2.36.4 Laird Performance Materials Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.36.5 Laird Performance Materials Recent Developments/Updates

2.37 Heraeus Holding GmbH

2.37.1 Heraeus Holding GmbH Details

2.37.2 Heraeus Holding GmbH Major Business

2.37.3 Heraeus Holding GmbH Radiation-Hardened Electronic Material Product and Services

2.37.4 Heraeus Holding GmbH Radiation-Hardened Electronic Material Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.37.5 Heraeus Holding GmbH Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: RADIATION-HARDENED ELECTRONIC MATERIAL BY MANUFACTURER

3.1 Global Radiation-Hardened Electronic Material Sales Quantity by Manufacturer (2021-2026)

3.2 Global Radiation-Hardened Electronic Material Revenue by Manufacturer (2021-2026)

3.3 Global Radiation-Hardened Electronic Material Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Radiation-Hardened Electronic Material by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Radiation-Hardened Electronic Material Manufacturer Market Share in 2025

3.4.3 Top 6 Radiation-Hardened Electronic Material Manufacturer Market Share in 2025

3.5 Radiation-Hardened Electronic Material Market: Overall Company Footprint Analysis

3.5.1 Radiation-Hardened Electronic Material Market: Region Footprint

3.5.2 Radiation-Hardened Electronic Material Market: Company Product Type

Footprint

3.5.3 Radiation-Hardened Electronic Material Market: Company Product Application

Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Radiation-Hardened Electronic Material Market Size by Region

4.1.1 Global Radiation-Hardened Electronic Material Sales Quantity by Region
(2021-2032)

4.1.2 Global Radiation-Hardened Electronic Material Consumption Value by Region
(2021-2032)

4.1.3 Global Radiation-Hardened Electronic Material Average Price by Region
(2021-2032)

4.2 North America Radiation-Hardened Electronic Material Consumption Value
(2021-2032)

4.3 Europe Radiation-Hardened Electronic Material Consumption Value (2021-2032)

4.4 Asia-Pacific Radiation-Hardened Electronic Material Consumption Value
(2021-2032)

4.5 South America Radiation-Hardened Electronic Material Consumption Value
(2021-2032)

4.6 Middle East & Africa Radiation-Hardened Electronic Material Consumption Value
(2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

5.2 Global Radiation-Hardened Electronic Material Consumption Value by Type
(2021-2032)

5.3 Global Radiation-Hardened Electronic Material Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Radiation-Hardened Electronic Material Sales Quantity by Application
(2021-2032)

6.2 Global Radiation-Hardened Electronic Material Consumption Value by Application
(2021-2032)

6.3 Global Radiation-Hardened Electronic Material Average Price by Application

(2021-2032)

7 NORTH AMERICA

7.1 North America Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

7.2 North America Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2032)

7.3 North America Radiation-Hardened Electronic Material Market Size by Country

7.3.1 North America Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2032)

7.3.2 North America Radiation-Hardened Electronic Material Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

8.2 Europe Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2032)

8.3 Europe Radiation-Hardened Electronic Material Market Size by Country

8.3.1 Europe Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2032)

8.3.2 Europe Radiation-Hardened Electronic Material Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Radiation-Hardened Electronic Material Market Size by Region

9.3.1 Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Radiation-Hardened Electronic Material Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

10.2 South America Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2032)

10.3 South America Radiation-Hardened Electronic Material Market Size by Country

10.3.1 South America Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2032)

10.3.2 South America Radiation-Hardened Electronic Material Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Radiation-Hardened Electronic Material Market Size by Country

11.3.1 Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Radiation-Hardened Electronic Material Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

- 11.3.4 Egypt Market Size and Forecast (2021-2032)
- 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
- 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Radiation-Hardened Electronic Material Market Drivers
- 12.2 Radiation-Hardened Electronic Material Market Restraints
- 12.3 Radiation-Hardened Electronic Material Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Radiation-Hardened Electronic Material and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Radiation-Hardened Electronic Material
- 13.3 Radiation-Hardened Electronic Material Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Radiation-Hardened Electronic Material Typical Distributors
- 14.3 Radiation-Hardened Electronic Material Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Radiation-Hardened Electronic Material Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Radiation-Hardened Electronic Material Consumption Value by Radiation Reliability Requirement, (USD Million), 2021 & 2025 & 2032

Table 3. Global Radiation-Hardened Electronic Material Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Soitec Basic Information, Manufacturing Base and Competitors

Table 5. Soitec Major Business

Table 6. Soitec Radiation-Hardened Electronic Material Product and Services

Table 7. Soitec Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 8. Soitec Recent Developments/Updates

Table 9. GlobalWafers Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 10. GlobalWafers Co., Ltd. Major Business

Table 11. GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 12. GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 13. GlobalWafers Co., Ltd. Recent Developments/Updates

Table 14. SUMCO Corporation Basic Information, Manufacturing Base and Competitors

Table 15. SUMCO Corporation Major Business

Table 16. SUMCO Corporation Radiation-Hardened Electronic Material Product and Services

Table 17. SUMCO Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 18. SUMCO Corporation Recent Developments/Updates

Table 19. Okmetic Oy Basic Information, Manufacturing Base and Competitors

Table 20. Okmetic Oy Major Business

Table 21. Okmetic Oy Radiation-Hardened Electronic Material Product and Services

Table 22. Okmetic Oy Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share

(2021-2026)

Table 23. Okmetic Oy Recent Developments/Updates

Table 24. Shanghai Simgui Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 25. Shanghai Simgui Technology Co., Ltd. Major Business

Table 26. Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 27. Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 28. Shanghai Simgui Technology Co., Ltd. Recent Developments/Updates

Table 29. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 30. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Major Business

Table 31. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 32. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 33. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Recent Developments/Updates

Table 34. Wolfspeed, Inc. Basic Information, Manufacturing Base and Competitors

Table 35. Wolfspeed, Inc. Major Business

Table 36. Wolfspeed, Inc. Radiation-Hardened Electronic Material Product and Services

Table 37. Wolfspeed, Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 38. Wolfspeed, Inc. Recent Developments/Updates

Table 39. Coherent Corp. Basic Information, Manufacturing Base and Competitors

Table 40. Coherent Corp. Major Business

Table 41. Coherent Corp. Radiation-Hardened Electronic Material Product and Services

Table 42. Coherent Corp. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 43. Coherent Corp. Recent Developments/Updates

Table 44. SK siltron css Basic Information, Manufacturing Base and Competitors

Table 45. SK siltron css Major Business

Table 46. SK siltron css Radiation-Hardened Electronic Material Product and Services

Table 47. SK siltron css Radiation-Hardened Electronic Material Sales Quantity

(Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 48. SK siltron css Recent Developments/Updates

Table 49. onsemi Basic Information, Manufacturing Base and Competitors

Table 50. onsemi Major Business

Table 51. onsemi Radiation-Hardened Electronic Material Product and Services

Table 52. onsemi Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 53. onsemi Recent Developments/Updates

Table 54. SICC Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 55. SICC Co., Ltd. Major Business

Table 56. SICC Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 57. SICC Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 58. SICC Co., Ltd. Recent Developments/Updates

Table 59. Tankeblue Semiconductor Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 60. Tankeblue Semiconductor Co., Ltd. Major Business

Table 61. Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 62. Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 63. Tankeblue Semiconductor Co., Ltd. Recent Developments/Updates

Table 64. Sanan Semiconductor Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 65. Sanan Semiconductor Co., Ltd. Major Business

Table 66. Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 67. Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 68. Sanan Semiconductor Co., Ltd. Recent Developments/Updates

Table 69. AXT, Inc. Basic Information, Manufacturing Base and Competitors

Table 70. AXT, Inc. Major Business

Table 71. AXT, Inc. Radiation-Hardened Electronic Material Product and Services

Table 72. AXT, Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons),

Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 73. AXT, Inc. Recent Developments/Updates

Table 74. Freiberger Compound Materials GmbH Basic Information, Manufacturing Base and Competitors

Table 75. Freiberger Compound Materials GmbH Major Business

Table 76. Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material Product and Services

Table 77. Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Freiberger Compound Materials GmbH Recent Developments/Updates

Table 79. Sumitomo Electric Industries, Ltd. Basic Information, Manufacturing Base and Competitors

Table 80. Sumitomo Electric Industries, Ltd. Major Business

Table 81. Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Product and Services

Table 82. Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 83. Sumitomo Electric Industries, Ltd. Recent Developments/Updates

Table 84. IQE plc Basic Information, Manufacturing Base and Competitors

Table 85. IQE plc Major Business

Table 86. IQE plc Radiation-Hardened Electronic Material Product and Services

Table 87. IQE plc Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 88. IQE plc Recent Developments/Updates

Table 89. Qnity Electronics, Inc. Basic Information, Manufacturing Base and Competitors

Table 90. Qnity Electronics, Inc. Major Business

Table 91. Qnity Electronics, Inc. Radiation-Hardened Electronic Material Product and Services

Table 92. Qnity Electronics, Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 93. Qnity Electronics, Inc. Recent Developments/Updates

Table 94. UBE Corporation Basic Information, Manufacturing Base and Competitors

Table 95. UBE Corporation Major Business

Table 96. UBE Corporation Radiation-Hardened Electronic Material Product and Services

Table 97. UBE Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. UBE Corporation Recent Developments/Updates

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

Table 100. Kaneka Corporation Major Business

Table 101. Kaneka Corporation Radiation-Hardened Electronic Material Product and Services

Table 102. Kaneka Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Kaneka Corporation Recent Developments/Updates

Table 104. PI Advanced Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 105. PI Advanced Materials Co., Ltd. Major Business

Table 106. PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 107. PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. PI Advanced Materials Co., Ltd. Recent Developments/Updates

Table 109. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 110. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Major Business

Table 111. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 112. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 113. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Recent Developments/Updates

Table 114. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 115. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Major Business

Table 116. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 117. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg),

Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 118. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Recent Developments/Updates

Table 119. Arlon Electronic Materials Basic Information, Manufacturing Base and Competitors

Table 120. Arlon Electronic Materials Major Business

Table 121. Arlon Electronic Materials Radiation-Hardened Electronic Material Product and Services

Table 122. Arlon Electronic Materials Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 123. Arlon Electronic Materials Recent Developments/Updates

Table 124. Rogers Corporation Basic Information, Manufacturing Base and Competitors

Table 125. Rogers Corporation Major Business

Table 126. Rogers Corporation Radiation-Hardened Electronic Material Product and Services

Table 127. Rogers Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Rogers Corporation Recent Developments/Updates

Table 129. Isola Group Basic Information, Manufacturing Base and Competitors

Table 130. Isola Group Major Business

Table 131. Isola Group Radiation-Hardened Electronic Material Product and Services

Table 132. Isola Group Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Isola Group Recent Developments/Updates

Table 134. Panasonic Holdings Corporation Basic Information, Manufacturing Base and Competitors

Table 135. Panasonic Holdings Corporation Major Business

Table 136. Panasonic Holdings Corporation Radiation-Hardened Electronic Material Product and Services

Table 137. Panasonic Holdings Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 138. Panasonic Holdings Corporation Recent Developments/Updates

Table 139. Dow Inc. Basic Information, Manufacturing Base and Competitors

Table 140. Dow Inc. Major Business

Table 141. Dow Inc. Radiation-Hardened Electronic Material Product and Services

Table 142. Dow Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 143. Dow Inc. Recent Developments/Updates

Table 144. Momentive Performance Materials Inc. Basic Information, Manufacturing Base and Competitors

Table 145. Momentive Performance Materials Inc. Major Business

Table 146. Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Product and Services

Table 147. Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 148. Momentive Performance Materials Inc. Recent Developments/Updates

Table 149. Avantor, Inc. Basic Information, Manufacturing Base and Competitors

Table 150. Avantor, Inc. Major Business

Table 151. Avantor, Inc. Radiation-Hardened Electronic Material Product and Services

Table 152. Avantor, Inc. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 153. Avantor, Inc. Recent Developments/Updates

Table 154. Wacker Chemie AG Basic Information, Manufacturing Base and Competitors

Table 155. Wacker Chemie AG Major Business

Table 156. Wacker Chemie AG Radiation-Hardened Electronic Material Product and Services

Table 157. Wacker Chemie AG Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Wacker Chemie AG Recent Developments/Updates

Table 159. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 160. Henkel AG & Co. KGaA Major Business

Table 161. Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Product and Services

Table 162. Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Henkel AG & Co. KGaA Recent Developments/Updates

Table 164. Shin-Etsu Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 165. Shin-Etsu Chemical Co., Ltd. Major Business

Table 166. Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Product and Services

Table 167. Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 168. Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

Table 169. 3M Company Basic Information, Manufacturing Base and Competitors

Table 170. 3M Company Major Business

Table 171. 3M Company Radiation-Hardened Electronic Material Product and Services

Table 172. 3M Company Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 173. 3M Company Recent Developments/Updates

Table 174. Parker Hannifin Corporation Basic Information, Manufacturing Base and Competitors

Table 175. Parker Hannifin Corporation Major Business

Table 176. Parker Hannifin Corporation Radiation-Hardened Electronic Material Product and Services

Table 177. Parker Hannifin Corporation Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 178. Parker Hannifin Corporation Recent Developments/Updates

Table 179. Laird Performance Materials Basic Information, Manufacturing Base and Competitors

Table 180. Laird Performance Materials Major Business

Table 181. Laird Performance Materials Radiation-Hardened Electronic Material Product and Services

Table 182. Laird Performance Materials Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 183. Laird Performance Materials Recent Developments/Updates

Table 184. Heraeus Holding GmbH Basic Information, Manufacturing Base and Competitors

Table 185. Heraeus Holding GmbH Major Business

Table 186. Heraeus Holding GmbH Radiation-Hardened Electronic Material Product and Services

Table 187. Heraeus Holding GmbH Radiation-Hardened Electronic Material Sales Quantity (Kilotons), Average Price (US\$/kg), Revenue (USD Million), Gross Margin and

Market Share (2021-2026)

Table 188. Heraeus Holding GmbH Recent Developments/Updates

Table 189. Global Radiation-Hardened Electronic Material Sales Quantity by Manufacturer (2021-2026) & (Kilotons)

Table 190. Global Radiation-Hardened Electronic Material Revenue by Manufacturer (2021-2026) & (USD Million)

Table 191. Global Radiation-Hardened Electronic Material Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 192. Market Position of Manufacturers in Radiation-Hardened Electronic Material, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 193. Head Office and Radiation-Hardened Electronic Material Production Site of Key Manufacturer

Table 194. Radiation-Hardened Electronic Material Market: Company Product Type Footprint

Table 195. Radiation-Hardened Electronic Material Market: Company Product Application Footprint

Table 196. Radiation-Hardened Electronic Material New Market Entrants and Barriers to Market Entry

Table 197. Radiation-Hardened Electronic Material Mergers, Acquisition, Agreements, and Collaborations

Table 198. Global Radiation-Hardened Electronic Material Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 199. Global Radiation-Hardened Electronic Material Sales Quantity by Region (2021-2026) & (Kilotons)

Table 200. Global Radiation-Hardened Electronic Material Sales Quantity by Region (2027-2032) & (Kilotons)

Table 201. Global Radiation-Hardened Electronic Material Consumption Value by Region (2021-2026) & (USD Million)

Table 202. Global Radiation-Hardened Electronic Material Consumption Value by Region (2027-2032) & (USD Million)

Table 203. Global Radiation-Hardened Electronic Material Average Price by Region (2021-2026) & (US\$/kg)

Table 204. Global Radiation-Hardened Electronic Material Average Price by Region (2027-2032) & (US\$/kg)

Table 205. Global Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 206. Global Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 207. Global Radiation-Hardened Electronic Material Consumption Value by Type

(2021-2026) & (USD Million)

Table 208. Global Radiation-Hardened Electronic Material Consumption Value by Type (2027-2032) & (USD Million)

Table 209. Global Radiation-Hardened Electronic Material Average Price by Type (2021-2026) & (US\$/kg)

Table 210. Global Radiation-Hardened Electronic Material Average Price by Type (2027-2032) & (US\$/kg)

Table 211. Global Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 212. Global Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 213. Global Radiation-Hardened Electronic Material Consumption Value by Application (2021-2026) & (USD Million)

Table 214. Global Radiation-Hardened Electronic Material Consumption Value by Application (2027-2032) & (USD Million)

Table 215. Global Radiation-Hardened Electronic Material Average Price by Application (2021-2026) & (US\$/kg)

Table 216. Global Radiation-Hardened Electronic Material Average Price by Application (2027-2032) & (US\$/kg)

Table 217. North America Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 218. North America Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 219. North America Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 220. North America Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 221. North America Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2026) & (Kilotons)

Table 222. North America Radiation-Hardened Electronic Material Sales Quantity by Country (2027-2032) & (Kilotons)

Table 223. North America Radiation-Hardened Electronic Material Consumption Value by Country (2021-2026) & (USD Million)

Table 224. North America Radiation-Hardened Electronic Material Consumption Value by Country (2027-2032) & (USD Million)

Table 225. Europe Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 226. Europe Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 227. Europe Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 228. Europe Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 229. Europe Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2026) & (Kilotons)

Table 230. Europe Radiation-Hardened Electronic Material Sales Quantity by Country (2027-2032) & (Kilotons)

Table 231. Europe Radiation-Hardened Electronic Material Consumption Value by Country (2021-2026) & (USD Million)

Table 232. Europe Radiation-Hardened Electronic Material Consumption Value by Country (2027-2032) & (USD Million)

Table 233. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 234. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 235. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 236. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 237. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Region (2021-2026) & (Kilotons)

Table 238. Asia-Pacific Radiation-Hardened Electronic Material Sales Quantity by Region (2027-2032) & (Kilotons)

Table 239. Asia-Pacific Radiation-Hardened Electronic Material Consumption Value by Region (2021-2026) & (USD Million)

Table 240. Asia-Pacific Radiation-Hardened Electronic Material Consumption Value by Region (2027-2032) & (USD Million)

Table 241. South America Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 242. South America Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 243. South America Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 244. South America Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 245. South America Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2026) & (Kilotons)

Table 246. South America Radiation-Hardened Electronic Material Sales Quantity by

Country (2027-2032) & (Kilotons)

Table 247. South America Radiation-Hardened Electronic Material Consumption Value by Country (2021-2026) & (USD Million)

Table 248. South America Radiation-Hardened Electronic Material Consumption Value by Country (2027-2032) & (USD Million)

Table 249. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Type (2021-2026) & (Kilotons)

Table 250. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Type (2027-2032) & (Kilotons)

Table 251. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Application (2021-2026) & (Kilotons)

Table 252. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Application (2027-2032) & (Kilotons)

Table 253. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Country (2021-2026) & (Kilotons)

Table 254. Middle East & Africa Radiation-Hardened Electronic Material Sales Quantity by Country (2027-2032) & (Kilotons)

Table 255. Middle East & Africa Radiation-Hardened Electronic Material Consumption Value by Country (2021-2026) & (USD Million)

Table 256. Middle East & Africa Radiation-Hardened Electronic Material Consumption Value by Country (2027-2032) & (USD Million)

Table 257. Radiation-Hardened Electronic Material Raw Material

Table 258. Key Manufacturers of Radiation-Hardened Electronic Material Raw Materials

Table 259. Radiation-Hardened Electronic Material Typical Distributors

Table 260. Radiation-Hardened Electronic Material Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Radiation-Hardened Electronic Material Picture
- Figure 2. Global Radiation-Hardened Electronic Material Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Radiation-Hardened Electronic Material Revenue Market Share by Type in 2025
- Figure 4. Wafers and Substrates Examples
- Figure 5. Epitaxial Wafers Examples
- Figure 6. Films Examples
- Figure 7. Laminates and Copper-clad Laminates Examples
- Figure 8. Adhesives and Encapsulants Examples
- Figure 9. Conformal Coatings Examples
- Figure 10. Others Examples
- Figure 11. Others Examples
- Figure 12. Global Radiation-Hardened Electronic Material Revenue by Radiation Reliability Requirement, (USD Million), 2021 & 2025 & 2032
- Figure 13. Global Radiation-Hardened Electronic Material Revenue Market Share by Radiation Reliability Requirement in 2025
- Figure 14. Total Ionizing Dose Resistant Examples
- Figure 15. Single Event Effect Mitigation Examples
- Figure 16. Displacement Damage Resistant Examples
- Figure 17. Low Outgassing Space-grade Materials Examples
- Figure 18. Environmental Reliability Support Materials Examples
- Figure 19. Others Examples
- Figure 20. Global Radiation-Hardened Electronic Material Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 21. Global Radiation-Hardened Electronic Material Revenue Market Share by Application in 2025
- Figure 22. Satellite Platform Electronics Examples
- Figure 23. Space Payload Electronics Examples
- Figure 24. Deep Space and Space Science Systems Examples
- Figure 25. Nuclear Industry Electronics Examples
- Figure 26. Particle Detection and Research Electronics Examples
- Figure 27. Defense and Strategic Electronics Examples
- Figure 28. Aerospace Avionics Examples
- Figure 29. Others Examples

Figure 30. Others Examples

Figure 31. Global Radiation-Hardened Electronic Material Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 32. Global Radiation-Hardened Electronic Material Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 33. Global Radiation-Hardened Electronic Material Sales Quantity (2021-2032) & (Kilotons)

Figure 34. Global Radiation-Hardened Electronic Material Price (2021-2032) & (US\$/kg)

Figure 35. Global Radiation-Hardened Electronic Material Sales Quantity Market Share by Manufacturer in 2025

Figure 36. Global Radiation-Hardened Electronic Material Revenue Market Share by Manufacturer in 2025

Figure 37. Producer Shipments of Radiation-Hardened Electronic Material by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 38. Top 3 Radiation-Hardened Electronic Material Manufacturer (Revenue) Market Share in 2025

Figure 39. Top 6 Radiation-Hardened Electronic Material Manufacturer (Revenue) Market Share in 2025

Figure 40. Global Radiation-Hardened Electronic Material Sales Quantity Market Share by Region (2021-2032)

Figure 41. Global Radiation-Hardened Electronic Material Consumption Value Market Share by Region (2021-2032)

Figure 42. North America Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 43. Europe Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 44. Asia-Pacific Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 45. South America Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 46. Middle East & Africa Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 47. Global Radiation-Hardened Electronic Material Sales Quantity Market Share by Type (2021-2032)

Figure 48. Global Radiation-Hardened Electronic Material Consumption Value Market Share by Type (2021-2032)

Figure 49. Global Radiation-Hardened Electronic Material Average Price by Type (2021-2032) & (US\$/kg)

Figure 50. Global Radiation-Hardened Electronic Material Sales Quantity Market Share

by Application (2021-2032)

Figure 51. Global Radiation-Hardened Electronic Material Revenue Market Share by Application (2021-2032)

Figure 52. Global Radiation-Hardened Electronic Material Average Price by Application (2021-2032) & (US\$/kg)

Figure 53. North America Radiation-Hardened Electronic Material Sales Quantity Market Share by Type (2021-2032)

Figure 54. North America Radiation-Hardened Electronic Material Sales Quantity Market Share by Application (2021-2032)

Figure 55. North America Radiation-Hardened Electronic Material Sales Quantity Market Share by Country (2021-2032)

Figure 56. North America Radiation-Hardened Electronic Material Consumption Value Market Share by Country (2021-2032)

Figure 57. United States Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 58. Canada Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 59. Mexico Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

Figure 60. Europe Radiation-Hardened Electronic Material Sales Quantity Market Share by Type (2021-2032)

Figure 61. Europe Radiation-Hardened Electronic Material Sales Quantity Market Share by Application (2021-2032)

Figure 62. Europe Radiation-Hardened Electronic Material Sales Quantity Market Share by Country (2021-2032)

Figure 63. Europe Radiation-Hardened Electronic Material Consumption Value Market Share by Country (2021-2032)

Figure 64. Germany Radiation-Hardened Electronic Material Consumption Value (2021-2032) & (USD Million)

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