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Global Advanced-Node Etching Gases Market Growth 2026-2032

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Abstracts

The global Advanced-Node Etching Gases market size is predicted to grow from US$ 1057 million in 2025 to US$ 2017 million in 2032; it is expected to grow at a CAGR of 9.8% from 2026 to 2032.

Advanced-node etching gases are ultra-high-purity electronic specialty gases used in dry etch processes for advanced logic, DRAM, 3D NAND, and high-end power and compound semiconductors. The portfolio mainly includes C4F6, C4F8, CH2F2, CHF3, CF4, SF6, NF3, Cl2, BCl3, HBr, HI, PF3, and customized mixtures. In plasma, these materials generate reactive radicals and ions that selectively remove silicon, silicon oxide, silicon nitride, metals, and low-k dielectrics while controlling etch rate, selectivity, anisotropy, sidewall passivation, critical dimensions, particles, and metal impurities for high-aspect-ratio, atomic-layer, and cryogenic etch processes. Key barriers include molecular design, ultra-high-purity synthesis and purification, trace-impurity analysis, cylinder passivation, lot consistency, customer qualification, and low-GWP substitution. The blended gross margin is approximately 48%.

Demand is being driven by capacity additions for artificial intelligence and high-performance computing chips, HBM, advanced logic, and high-layer-count memory. As device architectures shift from planar structures to GAA, deep trenches, and high-aspect-ratio channels, the number of etch steps rises together with gas consumption per wafer and process-window requirements. Advanced packaging, backside power delivery, and new interconnect schemes also create more selective etch and interface-treatment needs.

Technology competition is moving from general-purpose fluorinated gases toward molecules and premixed formulations co-developed for specific material stacks and tool

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platforms. High selectivity, low damage, profile control, atomic layer etching, cryogenic etching, and low GWP are becoming central design targets. Suppliers need stable synthesis and purification, trace-impurity analysis, cylinder surface treatment, application evaluation, and joint qualification capabilities with fabs and equipment makers.

Supply remains concentrated among leading companies in Japan, South Korea, Europe, and the United States, while Chinese producers are accelerating qualification in fluorocarbon gases, hydrogen halides, and high-purity mixtures. Key risks include long customer qualification cycles, volatility in fluorine feedstocks and high-purity containers, hazardous-chemical compliance, export controls, and greenhouse-gas regulation. Low-GWP molecules, localized purification and filling, analytical services, and integration of gas supply with abatement systems are the main opportunities.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Advanced-Node Etching Gases Industry Forecast” looks at past sales and reviews total world Advanced-Node Etching Gases sales in 2025, providing a comprehensive analysis by region and market sector of projected Advanced-Node Etching Gases sales for 2026 through 2032. With Advanced-Node Etching Gases sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Advanced-Node Etching Gases industry.

This Insight Report provides a comprehensive analysis of the global Advanced-Node Etching Gases landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Advanced-Node Etching Gases portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Advanced-Node Etching Gases market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Advanced-Node Etching Gases and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Advanced-Node Etching Gases.

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This report presents a comprehensive overview, market shares, and growth opportunities of Advanced-Node Etching Gases market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fluorocarbon Etching Gases

Inorganic Fluorine Etching Gases

Chlorine-Based Etching Gases

Bromine- and Iodine-Based Etching Gases

Non-Halogen Reactive and Auxiliary Gases

Segmentation by Purity Grade:

4N to Below 5N

5N to Below 5N5

5N5 to Below 6N

6N and Above

Segmentation by Product Composition:

Single-Component Gases

Binary Premixed Gases

Multicomponent Premixed Gases

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Segmentation by Global Warming Potential:

GWP Below 150

GWP 150 to Below 1,000

GWP 1,000 and Above

GWP Not Assigned

Segmentation by Application:

Advanced Logic and Foundry Manufacturing

DRAM Manufacturing

3D NAND Manufacturing

Advanced Packaging and Interconnect

Power and Compound Semiconductor Manufacturing

MEMS, Sensors, and Optoelectronics

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Air Liquide

Linde

Merck

SK Specialty

Taiyo Nippon Sanso

Kanto Denka Kogyo

Resonac

Central Glass

Sumitomo Seika Chemicals

Daikin Industries

Solvay

Wonik Materials

Foosung

Hyosung Chemical

PERIC Special Gases

Guangdong Huate Gas

Jinhong Gas

GrandiT

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Nata Opto-Electronic Materials

Entegris

Key Questions Addressed in this Report

What is the 10-year outlook for the global Advanced-Node Etching Gases market?

What factors are driving Advanced-Node Etching Gases market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Advanced-Node Etching Gases market opportunities vary by end market size?

How does Advanced-Node Etching Gases break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Advanced-Node Etching Gases Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Advanced-Node Etching Gases by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Advanced-Node Etching Gases by Country/Region, 2021, 2025 & 2032
2.2 Advanced-Node Etching Gases Segment by Type
  2.2.1 Fluorocarbon Etching Gases
  2.2.2 Inorganic Fluorine Etching Gases
  2.2.3 Chlorine-Based Etching Gases
  2.2.4 Bromine- and Iodine-Based Etching Gases
  2.2.5 Non-Halogen Reactive and Auxiliary Gases
  2.2.6 Advanced-Node Etching Gases Sales by Type
    2.2.6.1 Global Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
    2.2.6.2 Global Advanced-Node Etching Gases Revenue and Market Share by Type (2021-2026)
    2.2.6.3 Global Advanced-Node Etching Gases Sale Price by Type (2021-2026)
2.3 Advanced-Node Etching Gases Segment by Purity Grade
  2.3.1 4N to Below 5N
  2.3.2 5N to Below 5N5
  2.3.3 5N5 to Below 6N
  2.3.4 6N and Above
  2.3.5 Advanced-Node Etching Gases Sales by Purity Grade

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2.3.5.1 Global Advanced-Node Etching Gases Sales Market Share by Purity Grade (2021-2026)
2.3.5.2 Global Advanced-Node Etching Gases Revenue and Market Share by Purity Grade (2021-2026)
2.3.5.3 Global Advanced-Node Etching Gases Sale Price by Purity Grade (2021-2026)
2.4 Advanced-Node Etching Gases Segment by Product Composition
2.4.1 Single-Component Gases
2.4.2 Binary Premixed Gases
2.4.3 Multicomponent Premixed Gases
2.4.4 Advanced-Node Etching Gases Sales by Product Composition
2.4.4.1 Global Advanced-Node Etching Gases Sales Market Share by Product Composition (2021-2026)
2.4.4.2 Global Advanced-Node Etching Gases Revenue and Market Share by Product Composition (2021-2026)
2.4.4.3 Global Advanced-Node Etching Gases Sale Price by Product Composition (2021-2026)
2.5 Advanced-Node Etching Gases Segment by Global Warming Potential
2.5.1 GWP Below 150
2.5.2 GWP 150 to Below 1,000
2.5.3 GWP 1,000 and Above
2.5.4 GWP Not Assigned
2.5.5 Advanced-Node Etching Gases Sales by Global Warming Potential
2.5.5.1 Global Advanced-Node Etching Gases Sales Market Share by Global Warming Potential (2021-2026)
2.5.5.2 Global Advanced-Node Etching Gases Revenue and Market Share by Global Warming Potential (2021-2026)
2.5.5.3 Global Advanced-Node Etching Gases Sale Price by Global Warming Potential (2021-2026)
2.6 Advanced-Node Etching Gases Segment by Application
2.6.1 Advanced Logic and Foundry Manufacturing
2.6.2 DRAM Manufacturing
2.6.3 3D NAND Manufacturing
2.6.4 Advanced Packaging and Interconnect
2.6.5 Power and Compound Semiconductor Manufacturing
2.6.6 MEMS, Sensors, and Optoelectronics
2.6.7 Advanced-Node Etching Gases Sales by Application
2.6.7.1 Global Advanced-Node Etching Gases Sale Market Share by Application (2021-2026)

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2.6.7.2 Global Advanced-Node Etching Gases Revenue and Market Share by Application (2021-2026)
2.6.7.3 Global Advanced-Node Etching Gases Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Advanced-Node Etching Gases Breakdown Data by Company
3.1.1 Global Advanced-Node Etching Gases Annual Sales by Company (2021-2026)
3.1.2 Global Advanced-Node Etching Gases Sales Market Share by Company (2021-2026)
3.2 Global Advanced-Node Etching Gases Annual Revenue by Company (2021-2026)
3.2.1 Global Advanced-Node Etching Gases Revenue by Company (2021-2026)
3.2.2 Global Advanced-Node Etching Gases Revenue Market Share by Company (2021-2026)
3.3 Global Advanced-Node Etching Gases Sale Price by Company
3.4 Key Manufacturers Advanced-Node Etching Gases Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Advanced-Node Etching Gases Product Location Distribution
3.4.2 Players Advanced-Node Etching Gases Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ADVANCED-NODE ETCHING GASES BY GEOGRAPHIC REGION

4.1 World Historic Advanced-Node Etching Gases Market Size by Geographic Region (2021-2026)
4.1.1 Global Advanced-Node Etching Gases Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Advanced-Node Etching Gases Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Advanced-Node Etching Gases Market Size by Country/Region (2021-2026)
4.2.1 Global Advanced-Node Etching Gases Annual Sales by Country/Region (2021-2026)
4.2.2 Global Advanced-Node Etching Gases Annual Revenue by Country/Region

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(2021-2026)
4.3 Americas Advanced-Node Etching Gases Sales Growth
4.4 APAC Advanced-Node Etching Gases Sales Growth
4.5 Europe Advanced-Node Etching Gases Sales Growth
4.6 Middle East & Africa Advanced-Node Etching Gases Sales Growth

5 AMERICAS

5.1 Americas Advanced-Node Etching Gases Sales by Country
  5.1.1 Americas Advanced-Node Etching Gases Sales by Country (2021-2026)
  5.1.2 Americas Advanced-Node Etching Gases Revenue by Country (2021-2026)
5.2 Americas Advanced-Node Etching Gases Sales by Type (2021-2026)
5.3 Americas Advanced-Node Etching Gases Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Advanced-Node Etching Gases Sales by Region
  6.1.1 APAC Advanced-Node Etching Gases Sales by Region (2021-2026)
  6.1.2 APAC Advanced-Node Etching Gases Revenue by Region (2021-2026)
6.2 APAC Advanced-Node Etching Gases Sales by Type (2021-2026)
6.3 APAC Advanced-Node Etching Gases Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Advanced-Node Etching Gases by Country
  7.1.1 Europe Advanced-Node Etching Gases Sales by Country (2021-2026)
  7.1.2 Europe Advanced-Node Etching Gases Revenue by Country (2021-2026)
7.2 Europe Advanced-Node Etching Gases Sales by Type (2021-2026)

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7.3 Europe Advanced-Node Etching Gases Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Advanced-Node Etching Gases by Country
8.1.1 Middle East & Africa Advanced-Node Etching Gases Sales by Country (2021-2026)
8.1.2 Middle East & Africa Advanced-Node Etching Gases Revenue by Country (2021-2026)
8.2 Middle East & Africa Advanced-Node Etching Gases Sales by Type (2021-2026)
8.3 Middle East & Africa Advanced-Node Etching Gases Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Advanced-Node Etching Gases
10.3 Manufacturing Process Analysis of Advanced-Node Etching Gases
10.4 Industry Chain Structure of Advanced-Node Etching Gases

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

+357 96 030922
info@marketpublishers.com

11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Advanced-Node Etching Gases Distributors
11.3 Advanced-Node Etching Gases Customer

12 WORLD FORECAST REVIEW FOR ADVANCED-NODE ETCHING GASES BY GEOGRAPHIC REGION

12.1 Global Advanced-Node Etching Gases Market Size Forecast by Region
12.1.1 Global Advanced-Node Etching Gases Forecast by Region (2027-2032)
12.1.2 Global Advanced-Node Etching Gases Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Advanced-Node Etching Gases Forecast by Type (2027-2032)
12.7 Global Advanced-Node Etching Gases Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Air Liquide
13.1.1 Air Liquide Company Information
13.1.2 Air Liquide Advanced-Node Etching Gases Product Portfolios and Specifications
13.1.3 Air Liquide Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Air Liquide Main Business Overview
13.1.5 Air Liquide Latest Developments
13.2 Linde
13.2.1 Linde Company Information
13.2.2 Linde Advanced-Node Etching Gases Product Portfolios and Specifications
13.2.3 Linde Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Linde Main Business Overview
13.2.5 Linde Latest Developments
13.3 Merck
13.3.1 Merck Company Information
13.3.2 Merck Advanced-Node Etching Gases Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.3.3 Merck Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Merck Main Business Overview
13.3.5 Merck Latest Developments
13.4 SK Specialty
13.4.1 SK Specialty Company Information
13.4.2 SK Specialty Advanced-Node Etching Gases Product Portfolios and Specifications
13.4.3 SK Specialty Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 SK Specialty Main Business Overview
13.4.5 SK Specialty Latest Developments
13.5 Taiyo Nippon Sanso
13.5.1 Taiyo Nippon Sanso Company Information
13.5.2 Taiyo Nippon Sanso Advanced-Node Etching Gases Product Portfolios and Specifications
13.5.3 Taiyo Nippon Sanso Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Taiyo Nippon Sanso Main Business Overview
13.5.5 Taiyo Nippon Sanso Latest Developments
13.6 Kanto Denka Kogyo
13.6.1 Kanto Denka Kogyo Company Information
13.6.2 Kanto Denka Kogyo Advanced-Node Etching Gases Product Portfolios and Specifications
13.6.3 Kanto Denka Kogyo Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Kanto Denka Kogyo Main Business Overview
13.6.5 Kanto Denka Kogyo Latest Developments
13.7 Resonac
13.7.1 Resonac Company Information
13.7.2 Resonac Advanced-Node Etching Gases Product Portfolios and Specifications
13.7.3 Resonac Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Resonac Main Business Overview
13.7.5 Resonac Latest Developments
13.8 Central Glass
13.8.1 Central Glass Company Information
13.8.2 Central Glass Advanced-Node Etching Gases Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.8.3 Central Glass Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Central Glass Main Business Overview
13.8.5 Central Glass Latest Developments
13.9 Sumitomo Seika Chemicals
13.9.1 Sumitomo Seika Chemicals Company Information
13.9.2 Sumitomo Seika Chemicals Advanced-Node Etching Gases Product Portfolios and Specifications
13.9.3 Sumitomo Seika Chemicals Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Sumitomo Seika Chemicals Main Business Overview
13.9.5 Sumitomo Seika Chemicals Latest Developments
13.10 Daikin Industries
13.10.1 Daikin Industries Company Information
13.10.2 Daikin Industries Advanced-Node Etching Gases Product Portfolios and Specifications
13.10.3 Daikin Industries Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Daikin Industries Main Business Overview
13.10.5 Daikin Industries Latest Developments
13.11 Solvay
13.11.1 Solvay Company Information
13.11.2 Solvay Advanced-Node Etching Gases Product Portfolios and Specifications
13.11.3 Solvay Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Solvay Main Business Overview
13.11.5 Solvay Latest Developments
13.12 Wonik Materials
13.12.1 Wonik Materials Company Information
13.12.2 Wonik Materials Advanced-Node Etching Gases Product Portfolios and Specifications
13.12.3 Wonik Materials Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Wonik Materials Main Business Overview
13.12.5 Wonik Materials Latest Developments
13.13 Foosung
13.13.1 Foosung Company Information
13.13.2 Foosung Advanced-Node Etching Gases Product Portfolios and Specifications
13.13.3 Foosung Advanced-Node Etching Gases Sales, Revenue, Price and Gross

+357 96 030922
info@marketpublishers.com

Margin (2021-2026)
13.13.4 Foosung Main Business Overview
13.13.5 Foosung Latest Developments
13.14 Hyosung Chemical
13.14.1 Hyosung Chemical Company Information
13.14.2 Hyosung Chemical Advanced-Node Etching Gases Product Portfolios and Specifications
13.14.3 Hyosung Chemical Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Hyosung Chemical Main Business Overview
13.14.5 Hyosung Chemical Latest Developments
13.15 PERIC Special Gases
13.15.1 PERIC Special Gases Company Information
13.15.2 PERIC Special Gases Advanced-Node Etching Gases Product Portfolios and Specifications
13.15.3 PERIC Special Gases Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 PERIC Special Gases Main Business Overview
13.15.5 PERIC Special Gases Latest Developments
13.16 Guangdong Huate Gas
13.16.1 Guangdong Huate Gas Company Information
13.16.2 Guangdong Huate Gas Advanced-Node Etching Gases Product Portfolios and Specifications
13.16.3 Guangdong Huate Gas Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Guangdong Huate Gas Main Business Overview
13.16.5 Guangdong Huate Gas Latest Developments
13.17 Jinhong Gas
13.17.1 Jinhong Gas Company Information
13.17.2 Jinhong Gas Advanced-Node Etching Gases Product Portfolios and Specifications
13.17.3 Jinhong Gas Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Jinhong Gas Main Business Overview
13.17.5 Jinhong Gas Latest Developments
13.18 GrandiT
13.18.1 GrandiT Company Information
13.18.2 GrandiT Advanced-Node Etching Gases Product Portfolios and Specifications
13.18.3 GrandiT Advanced-Node Etching Gases Sales, Revenue, Price and Gross

+357 96 030922
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Margin (2021-2026)
13.18.4 GrandiT Main Business Overview
13.18.5 GrandiT Latest Developments
13.19 Nata Opto-Electronic Materials
13.19.1 Nata Opto-Electronic Materials Company Information
13.19.2 Nata Opto-Electronic Materials Advanced-Node Etching Gases Product Portfolios and Specifications
13.19.3 Nata Opto-Electronic Materials Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Nata Opto-Electronic Materials Main Business Overview
13.19.5 Nata Opto-Electronic Materials Latest Developments
13.20 Entegris
13.20.1 Entegris Company Information
13.20.2 Entegris Advanced-Node Etching Gases Product Portfolios and Specifications
13.20.3 Entegris Advanced-Node Etching Gases Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Entegris Main Business Overview
13.20.5 Entegris Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Advanced-Node Etching Gases Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Advanced-Node Etching Gases Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Fluorocarbon Etching Gases
Table 4. Major Players of Inorganic Fluorine Etching Gases
Table 5. Major Players of Chlorine-Based Etching Gases
Table 6. Major Players of Bromine- and Iodine-Based Etching Gases
Table 7. Major Players of Non-Halogen Reactive and Auxiliary Gases
Table 8. Global Advanced-Node Etching Gases Sales by Type (2021-2026) & (L)
Table 9. Global Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
Table 10. Global Advanced-Node Etching Gases Revenue by Type (2021-2026) & ($ million)
Table 11. Global Advanced-Node Etching Gases Revenue Market Share by Type (2021-2026)
Table 12. Global Advanced-Node Etching Gases Sale Price by Type (2021-2026) & (US$/L)
Table 13. Major Players of 4N to Below 5N
Table 14. Major Players of 5N to Below 5N5
Table 15. Major Players of 5N5 to Below 6N
Table 16. Major Players of 6N and Above
Table 17. Global Advanced-Node Etching Gases Sales by Purity Grade (2021-2026) & (L)
Table 18. Global Advanced-Node Etching Gases Sales Market Share by Purity Grade (2021-2026)
Table 19. Global Advanced-Node Etching Gases Revenue by Purity Grade (2021-2026) & ($ million)
Table 20. Global Advanced-Node Etching Gases Revenue Market Share by Purity Grade (2021-2026)
Table 21. Global Advanced-Node Etching Gases Sale Price by Purity Grade (2021-2026) & (US$/L)
Table 22. Major Players of Single-Component Gases
Table 23. Major Players of Binary Premixed Gases
Table 24. Major Players of Multicomponent Premixed Gases

+357 96 030922
info@marketpublishers.com

Table 25. Global Advanced-Node Etching Gases Sales by Product Composition (2021-2026) & (L)
Table 26. Global Advanced-Node Etching Gases Sales Market Share by Product Composition (2021-2026)
Table 27. Global Advanced-Node Etching Gases Revenue by Product Composition (2021-2026) & ($ million)
Table 28. Global Advanced-Node Etching Gases Revenue Market Share by Product Composition (2021-2026)
Table 29. Global Advanced-Node Etching Gases Sale Price by Product Composition (2021-2026) & (US$/L)
Table 30. Major Players of GWP Below 150
Table 31. Major Players of GWP 150 to Below 1,000
Table 32. Major Players of GWP 1,000 and Above
Table 33. Major Players of GWP Not Assigned
Table 34. Global Advanced-Node Etching Gases Sales by Global Warming Potential (2021-2026) & (L)
Table 35. Global Advanced-Node Etching Gases Sales Market Share by Global Warming Potential (2021-2026)
Table 36. Global Advanced-Node Etching Gases Revenue by Global Warming Potential (2021-2026) & ($ million)
Table 37. Global Advanced-Node Etching Gases Revenue Market Share by Global Warming Potential (2021-2026)
Table 38. Global Advanced-Node Etching Gases Sale Price by Global Warming Potential (2021-2026) & (US$/L)
Table 39. Global Advanced-Node Etching Gases Sale by Application (2021-2026) & (L)
Table 40. Global Advanced-Node Etching Gases Sale Market Share by Application (2021-2026)
Table 41. Global Advanced-Node Etching Gases Revenue by Application (2021-2026) & ($ million)
Table 42. Global Advanced-Node Etching Gases Revenue Market Share by Application (2021-2026)
Table 43. Global Advanced-Node Etching Gases Sale Price by Application (2021-2026) & (US$/L)
Table 44. Global Advanced-Node Etching Gases Sales by Company (2021-2026) & (L)
Table 45. Global Advanced-Node Etching Gases Sales Market Share by Company (2021-2026)
Table 46. Global Advanced-Node Etching Gases Revenue by Company (2021-2026) & ($ millions)
Table 47. Global Advanced-Node Etching Gases Revenue Market Share by Company

+357 96 030922
info@marketpublishers.com

(2021-2026)
Table 48. Global Advanced-Node Etching Gases Sale Price by Company (2021-2026) & (US$/L)
Table 49. Key Manufacturers Advanced-Node Etching Gases Producing Area Distribution and Sales Area
Table 50. Players Advanced-Node Etching Gases Products Offered
Table 51. Advanced-Node Etching Gases Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 52. New Products and Potential Entrants
Table 53. Market M&A Activity & Strategy
Table 54. Global Advanced-Node Etching Gases Sales by Geographic Region (2021-2026) & (L)
Table 55. Global Advanced-Node Etching Gases Sales Market Share Geographic Region (2021-2026)
Table 56. Global Advanced-Node Etching Gases Revenue by Geographic Region (2021-2026) & ($ millions)
Table 57. Global Advanced-Node Etching Gases Revenue Market Share by Geographic Region (2021-2026)
Table 58. Global Advanced-Node Etching Gases Sales by Country/Region (2021-2026) & (L)
Table 59. Global Advanced-Node Etching Gases Sales Market Share by Country/Region (2021-2026)
Table 60. Global Advanced-Node Etching Gases Revenue by Country/Region (2021-2026) & ($ millions)
Table 61. Global Advanced-Node Etching Gases Revenue Market Share by Country/Region (2021-2026)
Table 62. Americas Advanced-Node Etching Gases Sales by Country (2021-2026) & (L)
Table 63. Americas Advanced-Node Etching Gases Sales Market Share by Country (2021-2026)
Table 64. Americas Advanced-Node Etching Gases Revenue by Country (2021-2026) & ($ millions)
Table 65. Americas Advanced-Node Etching Gases Sales by Type (2021-2026) & (L)
Table 66. Americas Advanced-Node Etching Gases Sales by Application (2021-2026) & (L)
Table 67. APAC Advanced-Node Etching Gases Sales by Region (2021-2026) & (L)
Table 68. APAC Advanced-Node Etching Gases Sales Market Share by Region (2021-2026)
Table 69. APAC Advanced-Node Etching Gases Revenue by Region (2021-2026) & ($ millions)

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Table 70. APAC Advanced-Node Etching Gases Sales by Type (2021-2026) & (L)
Table 71. APAC Advanced-Node Etching Gases Sales by Application (2021-2026) & (L)
Table 72. Europe Advanced-Node Etching Gases Sales by Country (2021-2026) & (L)
Table 73. Europe Advanced-Node Etching Gases Revenue by Country (2021-2026) & ($ millions)
Table 74. Europe Advanced-Node Etching Gases Sales by Type (2021-2026) & (L)
Table 75. Europe Advanced-Node Etching Gases Sales by Application (2021-2026) & (L)
Table 76. Middle East & Africa Advanced-Node Etching Gases Sales by Country (2021-2026) & (L)
Table 77. Middle East & Africa Advanced-Node Etching Gases Revenue Market Share by Country (2021-2026)
Table 78. Middle East & Africa Advanced-Node Etching Gases Sales by Type (2021-2026) & (L)
Table 79. Middle East & Africa Advanced-Node Etching Gases Sales by Application (2021-2026) & (L)
Table 80. Key Market Drivers & Growth Opportunities of Advanced-Node Etching Gases
Table 81. Key Market Challenges & Risks of Advanced-Node Etching Gases
Table 82. Key Industry Trends of Advanced-Node Etching Gases
Table 83. Advanced-Node Etching Gases Raw Material
Table 84. Key Suppliers of Raw Materials
Table 85. Advanced-Node Etching Gases Distributors List
Table 86. Advanced-Node Etching Gases Customer List
Table 87. Global Advanced-Node Etching Gases Sales Forecast by Region (2027-2032) & (L)
Table 88. Global Advanced-Node Etching Gases Revenue Forecast by Region (2027-2032) & ($ millions)
Table 89. Americas Advanced-Node Etching Gases Sales Forecast by Country (2027-2032) & (L)
Table 90. Americas Advanced-Node Etching Gases Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 91. APAC Advanced-Node Etching Gases Sales Forecast by Region (2027-2032) & (L)
Table 92. APAC Advanced-Node Etching Gases Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 93. Europe Advanced-Node Etching Gases Sales Forecast by Country (2027-2032) & (L)
Table 94. Europe Advanced-Node Etching Gases Revenue Forecast by Country (2027-2032) & ($ millions)

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Table 95. Middle East & Africa Advanced-Node Etching Gases Sales Forecast by Country (2027-2032) & (L)
Table 96. Middle East & Africa Advanced-Node Etching Gases Revenue Forecast by Country (2027-2032) & ($ millions)
Table 97. Global Advanced-Node Etching Gases Sales Forecast by Type (2027-2032) & (L)
Table 98. Global Advanced-Node Etching Gases Revenue Forecast by Type (2027-2032) & ($ millions)
Table 99. Global Advanced-Node Etching Gases Sales Forecast by Application (2027-2032) & (L)
Table 100. Global Advanced-Node Etching Gases Revenue Forecast by Application (2027-2032) & ($ millions)
Table 101. Air Liquide Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 102. Air Liquide Advanced-Node Etching Gases Product Portfolios and Specifications
Table 103. Air Liquide Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 104. Air Liquide Main Business
Table 105. Air Liquide Latest Developments
Table 106. Linde Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 107. Linde Advanced-Node Etching Gases Product Portfolios and Specifications
Table 108. Linde Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 109. Linde Main Business
Table 110. Linde Latest Developments
Table 111. Merck Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 112. Merck Advanced-Node Etching Gases Product Portfolios and Specifications
Table 113. Merck Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 114. Merck Main Business
Table 115. Merck Latest Developments
Table 116. SK Specialty Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 117. SK Specialty Advanced-Node Etching Gases Product Portfolios and Specifications
Table 118. SK Specialty Advanced-Node Etching Gases Sales (L), Revenue ($ Million),

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Price (US$/L) and Gross Margin (2021-2026)
Table 119. SK Specialty Main Business
Table 120. SK Specialty Latest Developments
Table 121. Taiyo Nippon Sanso Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 122. Taiyo Nippon Sanso Advanced-Node Etching Gases Product Portfolios and Specifications
Table 123. Taiyo Nippon Sanso Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 124. Taiyo Nippon Sanso Main Business
Table 125. Taiyo Nippon Sanso Latest Developments
Table 126. Kanto Denka Kogyo Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 127. Kanto Denka Kogyo Advanced-Node Etching Gases Product Portfolios and Specifications
Table 128. Kanto Denka Kogyo Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 129. Kanto Denka Kogyo Main Business
Table 130. Kanto Denka Kogyo Latest Developments
Table 131. Resonac Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 132. Resonac Advanced-Node Etching Gases Product Portfolios and Specifications
Table 133. Resonac Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 134. Resonac Main Business
Table 135. Resonac Latest Developments
Table 136. Central Glass Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 137. Central Glass Advanced-Node Etching Gases Product Portfolios and Specifications
Table 138. Central Glass Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 139. Central Glass Main Business
Table 140. Central Glass Latest Developments
Table 141. Sumitomo Seika Chemicals Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 142. Sumitomo Seika Chemicals Advanced-Node Etching Gases Product Portfolios and Specifications

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Table 143. Sumitomo Seika Chemicals Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 144. Sumitomo Seika Chemicals Main Business
Table 145. Sumitomo Seika Chemicals Latest Developments
Table 146. Daikin Industries Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 147. Daikin Industries Advanced-Node Etching Gases Product Portfolios and Specifications
Table 148. Daikin Industries Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 149. Daikin Industries Main Business
Table 150. Daikin Industries Latest Developments
Table 151. Solvay Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 152. Solvay Advanced-Node Etching Gases Product Portfolios and Specifications
Table 153. Solvay Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 154. Solvay Main Business
Table 155. Solvay Latest Developments
Table 156. Wonik Materials Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 157. Wonik Materials Advanced-Node Etching Gases Product Portfolios and Specifications
Table 158. Wonik Materials Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 159. Wonik Materials Main Business
Table 160. Wonik Materials Latest Developments
Table 161. Foosung Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 162. Foosung Advanced-Node Etching Gases Product Portfolios and Specifications
Table 163. Foosung Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 164. Foosung Main Business
Table 165. Foosung Latest Developments
Table 166. Hyosung Chemical Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 167. Hyosung Chemical Advanced-Node Etching Gases Product Portfolios and Specifications

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Table 168. Hyosung Chemical Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 169. Hyosung Chemical Main Business
Table 170. Hyosung Chemical Latest Developments
Table 171. PERIC Special Gases Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 172. PERIC Special Gases Advanced-Node Etching Gases Product Portfolios and Specifications
Table 173. PERIC Special Gases Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 174. PERIC Special Gases Main Business
Table 175. PERIC Special Gases Latest Developments
Table 176. Guangdong Huate Gas Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 177. Guangdong Huate Gas Advanced-Node Etching Gases Product Portfolios and Specifications
Table 178. Guangdong Huate Gas Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 179. Guangdong Huate Gas Main Business
Table 180. Guangdong Huate Gas Latest Developments
Table 181. Jinhong Gas Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 182. Jinhong Gas Advanced-Node Etching Gases Product Portfolios and Specifications
Table 183. Jinhong Gas Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 184. Jinhong Gas Main Business
Table 185. Jinhong Gas Latest Developments
Table 186. GrandiT Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 187. GrandiT Advanced-Node Etching Gases Product Portfolios and Specifications
Table 188. GrandiT Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 189. GrandiT Main Business
Table 190. GrandiT Latest Developments
Table 191. Nata Opto-Electronic Materials Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 192. Nata Opto-Electronic Materials Advanced-Node Etching Gases Product

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Portfolios and Specifications
Table 193. Nata Opto-Electronic Materials Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 194. Nata Opto-Electronic Materials Main Business
Table 195. Nata Opto-Electronic Materials Latest Developments
Table 196. Entegris Basic Information, Advanced-Node Etching Gases Manufacturing Base, Sales Area and Its Competitors
Table 197. Entegris Advanced-Node Etching Gases Product Portfolios and Specifications
Table 198. Entegris Advanced-Node Etching Gases Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 199. Entegris Main Business
Table 200. Entegris Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Advanced-Node Etching Gases
Figure 2. Advanced-Node Etching Gases Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Advanced-Node Etching Gases Sales Growth Rate 2021-2032 (L)
Figure 7. Global Advanced-Node Etching Gases Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Advanced-Node Etching Gases Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Advanced-Node Etching Gases Sales Market Share by Country/Region (2025)
Figure 10. Advanced-Node Etching Gases Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Fluorocarbon Etching Gases
Figure 12. Product Picture of Inorganic Fluorine Etching Gases
Figure 13. Product Picture of Chlorine-Based Etching Gases
Figure 14. Product Picture of Bromine- and Iodine-Based Etching Gases
Figure 15. Product Picture of Non-Halogen Reactive and Auxiliary Gases
Figure 16. Global Advanced-Node Etching Gases Sales Market Share by Type in 2026
Figure 17. Global Advanced-Node Etching Gases Revenue Market Share by Type (2021-2026)
Figure 18. Product Picture of 4N to Below 5N
Figure 19. Product Picture of 5N to Below 5N5
Figure 20. Product Picture of 5N5 to Below 6N
Figure 21. Product Picture of 6N and Above
Figure 22. Global Advanced-Node Etching Gases Sales Market Share by Purity Grade in 2026
Figure 23. Global Advanced-Node Etching Gases Revenue Market Share by Purity Grade (2021-2026)
Figure 24. Product Picture of Single-Component Gases
Figure 25. Product Picture of Binary Premixed Gases
Figure 26. Product Picture of Multicomponent Premixed Gases
Figure 27. Global Advanced-Node Etching Gases Sales Market Share by Product Composition in 2026
Figure 28. Global Advanced-Node Etching Gases Revenue Market Share by Product

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Composition (2021-2026)
Figure 29. Product Picture of GWP Below 150
Figure 30. Product Picture of GWP 150 to Below 1,000
Figure 31. Product Picture of GWP 1,000 and Above
Figure 32. Product Picture of GWP Not Assigned
Figure 33. Global Advanced-Node Etching Gases Sales Market Share by Global Warming Potential in 2026
Figure 34. Global Advanced-Node Etching Gases Revenue Market Share by Global Warming Potential (2021-2026)
Figure 35. Advanced-Node Etching Gases Consumed in Advanced Logic and Foundry Manufacturing
Figure 36. Global Advanced-Node Etching Gases Market: Advanced Logic and Foundry Manufacturing (2021-2026) & (L)
Figure 37. Advanced-Node Etching Gases Consumed in DRAM Manufacturing
Figure 38. Global Advanced-Node Etching Gases Market: DRAM Manufacturing (2021-2026) & (L)
Figure 39. Advanced-Node Etching Gases Consumed in 3D NAND Manufacturing
Figure 40. Global Advanced-Node Etching Gases Market: 3D NAND Manufacturing (2021-2026) & (L)
Figure 41. Advanced-Node Etching Gases Consumed in Advanced Packaging and Interconnect
Figure 42. Global Advanced-Node Etching Gases Market: Advanced Packaging and Interconnect (2021-2026) & (L)
Figure 43. Advanced-Node Etching Gases Consumed in Power and Compound Semiconductor Manufacturing
Figure 44. Global Advanced-Node Etching Gases Market: Power and Compound Semiconductor Manufacturing (2021-2026) & (L)
Figure 45. Advanced-Node Etching Gases Consumed in MEMS, Sensors, and Optoelectronics
Figure 46. Global Advanced-Node Etching Gases Market: MEMS, Sensors, and Optoelectronics (2021-2026) & (L)
Figure 47. Global Advanced-Node Etching Gases Sale Market Share by Application (2025)
Figure 48. Global Advanced-Node Etching Gases Revenue Market Share by Application in 2025
Figure 49. Advanced-Node Etching Gases Sales by Company in 2025 (L)
Figure 50. Global Advanced-Node Etching Gases Sales Market Share by Company in 2025
Figure 51. Advanced-Node Etching Gases Revenue by Company in 2025 ($ millions)

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Figure 52. Global Advanced-Node Etching Gases Revenue Market Share by Company in 2025
Figure 53. Global Advanced-Node Etching Gases Sales Market Share by Geographic Region (2021-2026)
Figure 54. Global Advanced-Node Etching Gases Revenue Market Share by Geographic Region in 2025
Figure 55. Americas Advanced-Node Etching Gases Sales 2021-2026 (L)
Figure 56. Americas Advanced-Node Etching Gases Revenue 2021-2026 ($ millions)
Figure 57. APAC Advanced-Node Etching Gases Sales 2021-2026 (L)
Figure 58. APAC Advanced-Node Etching Gases Revenue 2021-2026 ($ millions)
Figure 59. Europe Advanced-Node Etching Gases Sales 2021-2026 (L)
Figure 60. Europe Advanced-Node Etching Gases Revenue 2021-2026 ($ millions)
Figure 61. Middle East & Africa Advanced-Node Etching Gases Sales 2021-2026 (L)
Figure 62. Middle East & Africa Advanced-Node Etching Gases Revenue 2021-2026 ($ millions)
Figure 63. Americas Advanced-Node Etching Gases Sales Market Share by Country in 2025
Figure 64. Americas Advanced-Node Etching Gases Revenue Market Share by Country (2021-2026)
Figure 65. Americas Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
Figure 66. Americas Advanced-Node Etching Gases Sales Market Share by Application (2021-2026)
Figure 67. United States Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 68. Canada Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 69. Mexico Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 70. Brazil Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 71. APAC Advanced-Node Etching Gases Sales Market Share by Region in 2025
Figure 72. APAC Advanced-Node Etching Gases Revenue Market Share by Region (2021-2026)
Figure 73. APAC Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
Figure 74. APAC Advanced-Node Etching Gases Sales Market Share by Application (2021-2026)

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Figure 75. China Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 76. Japan Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 77. South Korea Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 78. Southeast Asia Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 79. India Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 80. Australia Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 81. China Taiwan Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 82. Europe Advanced-Node Etching Gases Sales Market Share by Country in 2025
Figure 83. Europe Advanced-Node Etching Gases Revenue Market Share by Country (2021-2026)
Figure 84. Europe Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
Figure 85. Europe Advanced-Node Etching Gases Sales Market Share by Application (2021-2026)
Figure 86. Germany Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 87. France Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 88. UK Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 89. Italy Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 90. Russia Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 91. Middle East & Africa Advanced-Node Etching Gases Sales Market Share by Country (2021-2026)
Figure 92. Middle East & Africa Advanced-Node Etching Gases Sales Market Share by Type (2021-2026)
Figure 93. Middle East & Africa Advanced-Node Etching Gases Sales Market Share by Application (2021-2026)
Figure 94. Egypt Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 95. South Africa Advanced-Node Etching Gases Revenue Growth 2021-2026 ($

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millions)
Figure 96. Israel Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 97. Turkey Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 98. GCC Countries Advanced-Node Etching Gases Revenue Growth 2021-2026 ($ millions)
Figure 99. Manufacturing Cost Structure Analysis of Advanced-Node Etching Gases in 2026
Figure 100. Manufacturing Process Analysis of Advanced-Node Etching Gases
Figure 101. Industry Chain Structure of Advanced-Node Etching Gases
Figure 102. Channels of Distribution
Figure 103. Global Advanced-Node Etching Gases Sales Market Forecast by Region (2027-2032)
Figure 104. Global Advanced-Node Etching Gases Revenue Market Share Forecast by Region (2027-2032)
Figure 105. Global Advanced-Node Etching Gases Sales Market Share Forecast by Type (2027-2032)
Figure 106. Global Advanced-Node Etching Gases Revenue Market Share Forecast by Type (2027-2032)
Figure 107. Global Advanced-Node Etching Gases Sales Market Share Forecast by Application (2027-2032)
Figure 108. Global Advanced-Node Etching Gases Revenue Market Share Forecast by Application (2027-2032)

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