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Global EUV Rinse Materials Market Growth 2026-2032

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Abstracts

The global EUV Rinse Materials market size is predicted to grow from US$ 80.22 million in 2025 to US$ 224 million in 2032; it is expected to grow at a CAGR of 15.6% from 2026 to 2032.

EUV rinse materials are ultra-high-purity functional process fluids used after photoresist development and before wafer spin drying in extreme ultraviolet lithography. They reduce liquid surface tension and capillary force, tune resist-surface wetting behavior, and control development residues so that critical dimensions and pattern profiles can be maintained while mitigating collapse, bridging, watermark, and particle defects in high-aspect-ratio features. Typical formulations use ultrapure water or high-purity organic media together with surfactants, polymers or pattern-reinforcement additives, buffering agents, and chelating components. Products are formulated for compatibility with chemically amplified EUV resists, metal oxide resists, and positive- or negative-tone development schemes. This study focuses on EUV-specific materials applied directly after development for wafer rinsing and pattern stabilization. The overall gross margin is approximately 52%.

Market Trends

EUV post-develop rinse materials are moving from conventional PFAS-containing low-surface-tension formulations toward PFAS-free and ultimately fully fluorine-free chemistries. As advanced nodes tighten tolerances for pattern collapse, bridging, LWR/CD stability, and micro-defects, rinse materials are evolving from simple residue-removal fluids into pattern-stabilization materials within the development-to-drying window. Formulation work increasingly balances lower capillary force, reduced resist swelling, lower residue, tighter trace-metal control, and compatibility with CAR, MOR, and emerging High-NA EUV processes.

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Drivers

Logic processes at 2 nm and below continue to increase EUV intensity, while advanced DRAM is adding more EUV-patterned layers, expanding demand for highly reliable post-develop materials per wafer. As pitch narrows and aspect ratios rise, capillary forces generated during DI-water rinsing become more likely to induce pattern collapse, increasing the value of specialized low-surface-tension rinses with stronger defect-control performance.

Restraints

The market is constrained by long customer qualification cycles, exceptionally strict controls on trace metals and particles, and a limited base of advanced-node customers. Strong process coupling exists among the resist, developer, rinse, and coat/develop track, so a formulation change often requires renewed validation of CD, LWR, defectivity, and drying margin, raising the switching cost for alternative suppliers.

Opportunities

PFAS-free and fluorine-free formulations represent the clearest growth opportunity as leading fabs tighten management of fluorinated process chemicals. MOR, negative-tone development, and High-NA EUV are also creating new development and drying conditions that require dedicated rinse solutions and joint formulation optimization, while regional supply-chain localization supports second-source qualification opportunities.

Challenges

The central technical challenge is to lower surface tension without increasing resist swelling, CD shift, bridging, or residue. At smaller dimensions, very low levels of impurities, surfactant adsorption, or formulation variation can translate into measurable defects, making high-purity feedstocks, submicron filtration, in-line quality control, and co-development with the full lithography process critical to stable commercialization.

Industry Chain Analysis

Upstream inputs include electronic-grade ultrapure water, high-purity organic solvents, fluorinated or non-fluorinated surfactants, polymers and pattern-reinforcement additives, buffers, chelating agents, and ultra-high-purity filtration materials. Midstream suppliers create value through formulation design, trace-metal and particle control, filtration and

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filling, and batch-to-batch consistency, followed by validation under representative EUV development conditions for collapse margin, CD/LWR, and defectivity. Downstream demand is concentrated in advanced logic, foundry, and DRAM production lines using EUV, together with R&D and pilot platforms developing next-generation lithography processes. Because small material variations can affect lithography yield, customer qualification and co-development capabilities are often more important than raw-material cost alone.

Segment Insights

By fluorine content, incumbent PFAS-based products still support a meaningful share of mature high-volume processes, while PFAS-free and fully fluorine-free systems are becoming the main direction for new qualifications. By resist platform, aqueous CAR rinses remain the principal commercial format today; as MOR and negative-tone processes expand, organic and mixed-medium rinse concepts are gaining relevance. Future differentiation will increasingly depend on the combined optimization of surface tension, resist affinity, residue, swelling, and defect windows rather than a single formulation component.

Downstream Market Opportunities

Advanced logic and foundry remain the most established demand base, while advanced DRAM represents a faster-growing incremental opportunity as the number of EUV layers rises. R&D and pilot lines are smaller in volume but strategically important for early validation of High-NA EUV, MOR, and fluorine-free chemistries, making them an important entry point before broader high-volume qualification.

Regional Insights

Asia-Pacific is the core consumption region for EUV post-develop rinse materials, supported by dense advanced wafer manufacturing and materials ecosystems in Taiwan, South Korea, and Japan. North America is growing with investments in advanced logic and memory, while High-NA EUV process-development activity is increasing demand for new-material qualification. Europe has a smaller direct wafer-consumption base but exerts significant influence on global product roadmaps through advanced materials R&D, equipment collaboration, and regulation of fluorinated chemicals.

Competitive Landscape Analysis

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The supplier landscape remains relatively concentrated, with established electronic-material companies benefiting from broad lithography portfolios and deep customer co-development capabilities. Merck has an explicit EUV rinse product and ongoing PFAS-free and fluorine-free development; BASF has long-standing technology in anti-pattern-collapse rinse chemistry; Fujifilm covers rinse and pre-wet applications within its EUV lithography materials platform; and YCChem has entered high-volume supply for advanced memory customers. Competition is shifting from surface-tension reduction alone toward environmental compliance, defect-window performance, cross-resist compatibility, and regional supply capability.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global EUV Rinse Materials 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 EUV Rinse Materials portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global EUV Rinse Materials market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for EUV Rinse Materials 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 EUV Rinse Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of EUV Rinse Materials market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

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Segmentation by Type:

PFAS-Based Rinse

Non-PFAS Fluorinated Rinse

Fluorine-Free Rinse

Others

Segmentation by Resist Type:

Chemically Amplified Resist Rinse

Metal Oxide Resist Rinse

Other Resist Rinse

Segmentation by Rinse Medium:

Aqueous Rinse

Organic Solvent Rinse

Mixed-Solvent Rinse

Segmentation by Development Tone:

Positive-Tone Rinse

Negative-Tone Rinse

Other

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Segmentation by Application:

Logic and Foundry

Memory Semiconductors

Semiconductor R&D

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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.

- Merck
- BASF
- Fujifilm
- YCChem

Key Questions Addressed in this Report

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What is the 10-year outlook for the global EUV Rinse Materials market?

What factors are driving EUV Rinse Materials market growth, globally and by region?

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

How do EUV Rinse Materials market opportunities vary by end market size?

How does EUV Rinse Materials 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 EUV Rinse Materials Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for EUV Rinse Materials by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for EUV Rinse Materials by Country/Region, 2021, 2025 & 2032
2.2 EUV Rinse Materials Segment by Type
  2.2.1 PFAS-Based Rinse
  2.2.2 Non-PFAS Fluorinated Rinse
  2.2.3 Fluorine-Free Rinse
  2.2.4 Others
  2.2.5 EUV Rinse Materials Sales by Type
    2.2.5.1 Global EUV Rinse Materials Sales Market Share by Type (2021-2026)
    2.2.5.2 Global EUV Rinse Materials Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global EUV Rinse Materials Sale Price by Type (2021-2026)
2.3 EUV Rinse Materials Segment by Resist Type
  2.3.1 Chemically Amplified Resist Rinse
  2.3.2 Metal Oxide Resist Rinse
  2.3.3 Other Resist Rinse
  2.3.4 EUV Rinse Materials Sales by Resist Type
    2.3.4.1 Global EUV Rinse Materials Sales Market Share by Resist Type (2021-2026)
    2.3.4.2 Global EUV Rinse Materials Revenue and Market Share by Resist Type (2021-2026)
    2.3.4.3 Global EUV Rinse Materials Sale Price by Resist Type (2021-2026)

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2.4 EUV Rinse Materials Segment by Rinse Medium
2.4.1 Aqueous Rinse
2.4.2 Organic Solvent Rinse
2.4.3 Mixed-Solvent Rinse
2.4.4 EUV Rinse Materials Sales by Rinse Medium
2.4.4.1 Global EUV Rinse Materials Sales Market Share by Rinse Medium (2021-2026)
2.4.4.2 Global EUV Rinse Materials Revenue and Market Share by Rinse Medium (2021-2026)
2.4.4.3 Global EUV Rinse Materials Sale Price by Rinse Medium (2021-2026)
2.5 EUV Rinse Materials Segment by Development Tone
2.5.1 Positive-Tone Rinse
2.5.2 Negative-Tone Rinse
2.5.3 Other
2.5.4 EUV Rinse Materials Sales by Development Tone
2.5.4.1 Global EUV Rinse Materials Sales Market Share by Development Tone (2021-2026)
2.5.4.2 Global EUV Rinse Materials Revenue and Market Share by Development Tone (2021-2026)
2.5.4.3 Global EUV Rinse Materials Sale Price by Development Tone (2021-2026)
2.6 EUV Rinse Materials Segment by Application
2.6.1 Logic and Foundry
2.6.2 Memory Semiconductors
2.6.3 Semiconductor R&D
2.6.4 Others
2.6.5 EUV Rinse Materials Sales by Application
2.6.5.1 Global EUV Rinse Materials Sale Market Share by Application (2021-2026)
2.6.5.2 Global EUV Rinse Materials Revenue and Market Share by Application (2021-2026)
2.6.5.3 Global EUV Rinse Materials Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global EUV Rinse Materials Breakdown Data by Company
3.1.1 Global EUV Rinse Materials Annual Sales by Company (2021-2026)
3.1.2 Global EUV Rinse Materials Sales Market Share by Company (2021-2026)
3.2 Global EUV Rinse Materials Annual Revenue by Company (2021-2026)
3.2.1 Global EUV Rinse Materials Revenue by Company (2021-2026)
3.2.2 Global EUV Rinse Materials Revenue Market Share by Company (2021-2026)

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3.3 Global EUV Rinse Materials Sale Price by Company
3.4 Key Manufacturers EUV Rinse Materials Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers EUV Rinse Materials Product Location Distribution
3.4.2 Players EUV Rinse Materials 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 EUV RINSE MATERIALS BY GEOGRAPHIC REGION

4.1 World Historic EUV Rinse Materials Market Size by Geographic Region (2021-2026)
4.1.1 Global EUV Rinse Materials Annual Sales by Geographic Region (2021-2026)
4.1.2 Global EUV Rinse Materials Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic EUV Rinse Materials Market Size by Country/Region (2021-2026)
4.2.1 Global EUV Rinse Materials Annual Sales by Country/Region (2021-2026)
4.2.2 Global EUV Rinse Materials Annual Revenue by Country/Region (2021-2026)
4.3 Americas EUV Rinse Materials Sales Growth
4.4 APAC EUV Rinse Materials Sales Growth
4.5 Europe EUV Rinse Materials Sales Growth
4.6 Middle East & Africa EUV Rinse Materials Sales Growth

5 AMERICAS

5.1 Americas EUV Rinse Materials Sales by Country
5.1.1 Americas EUV Rinse Materials Sales by Country (2021-2026)
5.1.2 Americas EUV Rinse Materials Revenue by Country (2021-2026)
5.2 Americas EUV Rinse Materials Sales by Type (2021-2026)
5.3 Americas EUV Rinse Materials Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

+357 96 030922
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6.1 APAC EUV Rinse Materials Sales by Region
6.1.1 APAC EUV Rinse Materials Sales by Region (2021-2026)
6.1.2 APAC EUV Rinse Materials Revenue by Region (2021-2026)
6.2 APAC EUV Rinse Materials Sales by Type (2021-2026)
6.3 APAC EUV Rinse Materials 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 EUV Rinse Materials by Country
7.1.1 Europe EUV Rinse Materials Sales by Country (2021-2026)
7.1.2 Europe EUV Rinse Materials Revenue by Country (2021-2026)
7.2 Europe EUV Rinse Materials Sales by Type (2021-2026)
7.3 Europe EUV Rinse Materials 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 EUV Rinse Materials by Country
8.1.1 Middle East & Africa EUV Rinse Materials Sales by Country (2021-2026)
8.1.2 Middle East & Africa EUV Rinse Materials Revenue by Country (2021-2026)
8.2 Middle East & Africa EUV Rinse Materials Sales by Type (2021-2026)
8.3 Middle East & Africa EUV Rinse Materials Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

+357 96 030922
info@marketpublishers.com

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 EUV Rinse Materials
10.3 Manufacturing Process Analysis of EUV Rinse Materials
10.4 Industry Chain Structure of EUV Rinse Materials

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 EUV Rinse Materials Distributors
11.3 EUV Rinse Materials Customer

12 WORLD FORECAST REVIEW FOR EUV RINSE MATERIALS BY GEOGRAPHIC REGION

12.1 Global EUV Rinse Materials Market Size Forecast by Region
  12.1.1 Global EUV Rinse Materials Forecast by Region (2027-2032)
  12.1.2 Global EUV Rinse Materials 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 EUV Rinse Materials Forecast by Type (2027-2032)
12.7 Global EUV Rinse Materials Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Merck
  13.1.1 Merck Company Information

+357 96 030922
info@marketpublishers.com

13.1.2 Merck EUV Rinse Materials Product Portfolios and Specifications
13.1.3 Merck EUV Rinse Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Merck Main Business Overview
13.1.5 Merck Latest Developments
13.2 BASF
13.2.1 BASF Company Information
13.2.2 BASF EUV Rinse Materials Product Portfolios and Specifications
13.2.3 BASF EUV Rinse Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 BASF Main Business Overview
13.2.5 BASF Latest Developments
13.3 Fujifilm
13.3.1 Fujifilm Company Information
13.3.2 Fujifilm EUV Rinse Materials Product Portfolios and Specifications
13.3.3 Fujifilm EUV Rinse Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Fujifilm Main Business Overview
13.3.5 Fujifilm Latest Developments
13.4 YCChem
13.4.1 YCChem Company Information
13.4.2 YCChem EUV Rinse Materials Product Portfolios and Specifications
13.4.3 YCChem EUV Rinse Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 YCChem Main Business Overview
13.4.5 YCChem Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. EUV Rinse Materials Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. EUV Rinse Materials Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of PFAS-Based Rinse
Table 4. Major Players of Non-PFAS Fluorinated Rinse
Table 5. Major Players of Fluorine-Free Rinse
Table 6. Major Players of Others
Table 7. Global EUV Rinse Materials Sales by Type (2021-2026) & (L)
Table 8. Global EUV Rinse Materials Sales Market Share by Type (2021-2026)
Table 9. Global EUV Rinse Materials Revenue by Type (2021-2026) & ($ million)
Table 10. Global EUV Rinse Materials Revenue Market Share by Type (2021-2026)
Table 11. Global EUV Rinse Materials Sale Price by Type (2021-2026) & (US$/L)
Table 12. Major Players of Chemically Amplified Resist Rinse
Table 13. Major Players of Metal Oxide Resist Rinse
Table 14. Major Players of Other Resist Rinse
Table 15. Global EUV Rinse Materials Sales by Resist Type (2021-2026) & (L)
Table 16. Global EUV Rinse Materials Sales Market Share by Resist Type (2021-2026)
Table 17. Global EUV Rinse Materials Revenue by Resist Type (2021-2026) & ($ million)
Table 18. Global EUV Rinse Materials Revenue Market Share by Resist Type (2021-2026)
Table 19. Global EUV Rinse Materials Sale Price by Resist Type (2021-2026) & (US$/L)
Table 20. Major Players of Aqueous Rinse
Table 21. Major Players of Organic Solvent Rinse
Table 22. Major Players of Mixed-Solvent Rinse
Table 23. Global EUV Rinse Materials Sales by Rinse Medium (2021-2026) & (L)
Table 24. Global EUV Rinse Materials Sales Market Share by Rinse Medium (2021-2026)
Table 25. Global EUV Rinse Materials Revenue by Rinse Medium (2021-2026) & ($ million)
Table 26. Global EUV Rinse Materials Revenue Market Share by Rinse Medium (2021-2026)
Table 27. Global EUV Rinse Materials Sale Price by Rinse Medium (2021-2026) & (US$/L)

+357 96 030922
info@marketpublishers.com

Table 28. Major Players of Positive-Tone Rinse
Table 29. Major Players of Negative-Tone Rinse
Table 30. Major Players of Other
Table 31. Global EUV Rinse Materials Sales by Development Tone (2021-2026) & (L)
Table 32. Global EUV Rinse Materials Sales Market Share by Development Tone (2021-2026)
Table 33. Global EUV Rinse Materials Revenue by Development Tone (2021-2026) & ($ million)
Table 34. Global EUV Rinse Materials Revenue Market Share by Development Tone (2021-2026)
Table 35. Global EUV Rinse Materials Sale Price by Development Tone (2021-2026) & (US$/L)
Table 36. Global EUV Rinse Materials Sale by Application (2021-2026) & (L)
Table 37. Global EUV Rinse Materials Sale Market Share by Application (2021-2026)
Table 38. Global EUV Rinse Materials Revenue by Application (2021-2026) & ($ million)
Table 39. Global EUV Rinse Materials Revenue Market Share by Application (2021-2026)
Table 40. Global EUV Rinse Materials Sale Price by Application (2021-2026) & (US$/L)
Table 41. Global EUV Rinse Materials Sales by Company (2021-2026) & (L)
Table 42. Global EUV Rinse Materials Sales Market Share by Company (2021-2026)
Table 43. Global EUV Rinse Materials Revenue by Company (2021-2026) & ($ millions)
Table 44. Global EUV Rinse Materials Revenue Market Share by Company (2021-2026)
Table 45. Global EUV Rinse Materials Sale Price by Company (2021-2026) & (US$/L)
Table 46. Key Manufacturers EUV Rinse Materials Producing Area Distribution and Sales Area
Table 47. Players EUV Rinse Materials Products Offered
Table 48. EUV Rinse Materials Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 49. New Products and Potential Entrants
Table 50. Market M&A Activity & Strategy
Table 51. Global EUV Rinse Materials Sales by Geographic Region (2021-2026) & (L)
Table 52. Global EUV Rinse Materials Sales Market Share Geographic Region (2021-2026)
Table 53. Global EUV Rinse Materials Revenue by Geographic Region (2021-2026) & ($ millions)
Table 54. Global EUV Rinse Materials Revenue Market Share by Geographic Region (2021-2026)
Table 55. Global EUV Rinse Materials Sales by Country/Region (2021-2026) & (L)

+357 96 030922
info@marketpublishers.com

Table 56. Global EUV Rinse Materials Sales Market Share by Country/Region (2021-2026)
Table 57. Global EUV Rinse Materials Revenue by Country/Region (2021-2026) & ($ millions)
Table 58. Global EUV Rinse Materials Revenue Market Share by Country/Region (2021-2026)
Table 59. Americas EUV Rinse Materials Sales by Country (2021-2026) & (L)
Table 60. Americas EUV Rinse Materials Sales Market Share by Country (2021-2026)
Table 61. Americas EUV Rinse Materials Revenue by Country (2021-2026) & ($ millions)
Table 62. Americas EUV Rinse Materials Sales by Type (2021-2026) & (L)
Table 63. Americas EUV Rinse Materials Sales by Application (2021-2026) & (L)
Table 64. APAC EUV Rinse Materials Sales by Region (2021-2026) & (L)
Table 65. APAC EUV Rinse Materials Sales Market Share by Region (2021-2026)
Table 66. APAC EUV Rinse Materials Revenue by Region (2021-2026) & ($ millions)
Table 67. APAC EUV Rinse Materials Sales by Type (2021-2026) & (L)
Table 68. APAC EUV Rinse Materials Sales by Application (2021-2026) & (L)
Table 69. Europe EUV Rinse Materials Sales by Country (2021-2026) & (L)
Table 70. Europe EUV Rinse Materials Revenue by Country (2021-2026) & ($ millions)
Table 71. Europe EUV Rinse Materials Sales by Type (2021-2026) & (L)
Table 72. Europe EUV Rinse Materials Sales by Application (2021-2026) & (L)
Table 73. Middle East & Africa EUV Rinse Materials Sales by Country (2021-2026) & (L)
Table 74. Middle East & Africa EUV Rinse Materials Revenue Market Share by Country (2021-2026)
Table 75. Middle East & Africa EUV Rinse Materials Sales by Type (2021-2026) & (L)
Table 76. Middle East & Africa EUV Rinse Materials Sales by Application (2021-2026) & (L)
Table 77. Key Market Drivers & Growth Opportunities of EUV Rinse Materials
Table 78. Key Market Challenges & Risks of EUV Rinse Materials
Table 79. Key Industry Trends of EUV Rinse Materials
Table 80. EUV Rinse Materials Raw Material
Table 81. Key Suppliers of Raw Materials
Table 82. EUV Rinse Materials Distributors List
Table 83. EUV Rinse Materials Customer List
Table 84. Global EUV Rinse Materials Sales Forecast by Region (2027-2032) & (L)
Table 85. Global EUV Rinse Materials Revenue Forecast by Region (2027-2032) & ($ millions)
Table 86. Americas EUV Rinse Materials Sales Forecast by Country (2027-2032) & (L)

+357 96 030922
info@marketpublishers.com

Table 87. Americas EUV Rinse Materials Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 88. APAC EUV Rinse Materials Sales Forecast by Region (2027-2032) & (L)
Table 89. APAC EUV Rinse Materials Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 90. Europe EUV Rinse Materials Sales Forecast by Country (2027-2032) & (L)
Table 91. Europe EUV Rinse Materials Revenue Forecast by Country (2027-2032) & ($ millions)
Table 92. Middle East & Africa EUV Rinse Materials Sales Forecast by Country (2027-2032) & (L)
Table 93. Middle East & Africa EUV Rinse Materials Revenue Forecast by Country (2027-2032) & ($ millions)
Table 94. Global EUV Rinse Materials Sales Forecast by Type (2027-2032) & (L)
Table 95. Global EUV Rinse Materials Revenue Forecast by Type (2027-2032) & ($ millions)
Table 96. Global EUV Rinse Materials Sales Forecast by Application (2027-2032) & (L)
Table 97. Global EUV Rinse Materials Revenue Forecast by Application (2027-2032) & ($ millions)
Table 98. Merck Basic Information, EUV Rinse Materials Manufacturing Base, Sales Area and Its Competitors
Table 99. Merck EUV Rinse Materials Product Portfolios and Specifications
Table 100. Merck EUV Rinse Materials Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 101. Merck Main Business
Table 102. Merck Latest Developments
Table 103. BASF Basic Information, EUV Rinse Materials Manufacturing Base, Sales Area and Its Competitors
Table 104. BASF EUV Rinse Materials Product Portfolios and Specifications
Table 105. BASF EUV Rinse Materials Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 106. BASF Main Business
Table 107. BASF Latest Developments
Table 108. Fujifilm Basic Information, EUV Rinse Materials Manufacturing Base, Sales Area and Its Competitors
Table 109. Fujifilm EUV Rinse Materials Product Portfolios and Specifications
Table 110. Fujifilm EUV Rinse Materials Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 111. Fujifilm Main Business
Table 112. Fujifilm Latest Developments

+357 96 030922
info@marketpublishers.com

Table 113. YCChem Basic Information, EUV Rinse Materials Manufacturing Base, Sales Area and Its Competitors
Table 114. YCChem EUV Rinse Materials Product Portfolios and Specifications
Table 115. YCChem EUV Rinse Materials Sales (L), Revenue ($ Million), Price (US$/L) and Gross Margin (2021-2026)
Table 116. YCChem Main Business
Table 117. YCChem Latest Developments

+357 96 030922
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List Of Figures

LIST OF FIGURES

Figure 1. Picture of EUV Rinse Materials
Figure 2. EUV Rinse Materials Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global EUV Rinse Materials Sales Growth Rate 2021-2032 (L)
Figure 7. Global EUV Rinse Materials Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. EUV Rinse Materials Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. EUV Rinse Materials Sales Market Share by Country/Region (2025)
Figure 10. EUV Rinse Materials Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of PFAS-Based Rinse
Figure 12. Product Picture of Non-PFAS Fluorinated Rinse
Figure 13. Product Picture of Fluorine-Free Rinse
Figure 14. Product Picture of Others
Figure 15. Global EUV Rinse Materials Sales Market Share by Type in 2026
Figure 16. Global EUV Rinse Materials Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Chemically Amplified Resist Rinse
Figure 18. Product Picture of Metal Oxide Resist Rinse
Figure 19. Product Picture of Other Resist Rinse
Figure 20. Global EUV Rinse Materials Sales Market Share by Resist Type in 2026
Figure 21. Global EUV Rinse Materials Revenue Market Share by Resist Type (2021-2026)
Figure 22. Product Picture of Aqueous Rinse
Figure 23. Product Picture of Organic Solvent Rinse
Figure 24. Product Picture of Mixed-Solvent Rinse
Figure 25. Global EUV Rinse Materials Sales Market Share by Rinse Medium in 2026
Figure 26. Global EUV Rinse Materials Revenue Market Share by Rinse Medium (2021-2026)
Figure 27. Product Picture of Positive-Tone Rinse
Figure 28. Product Picture of Negative-Tone Rinse
Figure 29. Product Picture of Other
Figure 30. Global EUV Rinse Materials Sales Market Share by Development Tone in 2026

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Figure 31. Global EUV Rinse Materials Revenue Market Share by Development Tone (2021-2026)
Figure 32. EUV Rinse Materials Consumed in Logic and Foundry
Figure 33. Global EUV Rinse Materials Market: Logic and Foundry (2021-2026) & (L)
Figure 34. EUV Rinse Materials Consumed in Memory Semiconductors
Figure 35. Global EUV Rinse Materials Market: Memory Semiconductors (2021-2026) & (L)
Figure 36. EUV Rinse Materials Consumed in Semiconductor R&D
Figure 37. Global EUV Rinse Materials Market: Semiconductor R&D (2021-2026) & (L)
Figure 38. EUV Rinse Materials Consumed in Others
Figure 39. Global EUV Rinse Materials Market: Others (2021-2026) & (L)
Figure 40. Global EUV Rinse Materials Sale Market Share by Application (2025)
Figure 41. Global EUV Rinse Materials Revenue Market Share by Application in 2025
Figure 42. EUV Rinse Materials Sales by Company in 2025 (L)
Figure 43. Global EUV Rinse Materials Sales Market Share by Company in 2025
Figure 44. EUV Rinse Materials Revenue by Company in 2025 ($ millions)
Figure 45. Global EUV Rinse Materials Revenue Market Share by Company in 2025
Figure 46. Global EUV Rinse Materials Sales Market Share by Geographic Region (2021-2026)
Figure 47. Global EUV Rinse Materials Revenue Market Share by Geographic Region in 2025
Figure 48. Americas EUV Rinse Materials Sales 2021-2026 (L)
Figure 49. Americas EUV Rinse Materials Revenue 2021-2026 ($ millions)
Figure 50. APAC EUV Rinse Materials Sales 2021-2026 (L)
Figure 51. APAC EUV Rinse Materials Revenue 2021-2026 ($ millions)
Figure 52. Europe EUV Rinse Materials Sales 2021-2026 (L)
Figure 53. Europe EUV Rinse Materials Revenue 2021-2026 ($ millions)
Figure 54. Middle East & Africa EUV Rinse Materials Sales 2021-2026 (L)
Figure 55. Middle East & Africa EUV Rinse Materials Revenue 2021-2026 ($ millions)
Figure 56. Americas EUV Rinse Materials Sales Market Share by Country in 2025
Figure 57. Americas EUV Rinse Materials Revenue Market Share by Country (2021-2026)
Figure 58. Americas EUV Rinse Materials Sales Market Share by Type (2021-2026)
Figure 59. Americas EUV Rinse Materials Sales Market Share by Application (2021-2026)
Figure 60. United States EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 61. Canada EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 62. Mexico EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 63. Brazil EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)

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Figure 64. APAC EUV Rinse Materials Sales Market Share by Region in 2025
Figure 65. APAC EUV Rinse Materials Revenue Market Share by Region (2021-2026)
Figure 66. APAC EUV Rinse Materials Sales Market Share by Type (2021-2026)
Figure 67. APAC EUV Rinse Materials Sales Market Share by Application (2021-2026)
Figure 68. China EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 69. Japan EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 70. South Korea EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 71. Southeast Asia EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 72. India EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 73. Australia EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 74. China Taiwan EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 75. Europe EUV Rinse Materials Sales Market Share by Country in 2025
Figure 76. Europe EUV Rinse Materials Revenue Market Share by Country (2021-2026)
Figure 77. Europe EUV Rinse Materials Sales Market Share by Type (2021-2026)
Figure 78. Europe EUV Rinse Materials Sales Market Share by Application (2021-2026)
Figure 79. Germany EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 80. France EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 81. UK EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 82. Italy EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 83. Russia EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 84. Middle East & Africa EUV Rinse Materials Sales Market Share by Country (2021-2026)
Figure 85. Middle East & Africa EUV Rinse Materials Sales Market Share by Type (2021-2026)
Figure 86. Middle East & Africa EUV Rinse Materials Sales Market Share by Application (2021-2026)
Figure 87. Egypt EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 88. South Africa EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 89. Israel EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 90. Turkey EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 91. GCC Countries EUV Rinse Materials Revenue Growth 2021-2026 ($ millions)
Figure 92. Manufacturing Cost Structure Analysis of EUV Rinse Materials in 2026
Figure 93. Manufacturing Process Analysis of EUV Rinse Materials
Figure 94. Industry Chain Structure of EUV Rinse Materials
Figure 95. Channels of Distribution
Figure 96. Global EUV Rinse Materials Sales Market Forecast by Region (2027-2032)
Figure 97. Global EUV Rinse Materials Revenue Market Share Forecast by Region (2027-2032)

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Figure 98. Global EUV Rinse Materials Sales Market Share Forecast by Type (2027-2032)
Figure 99. Global EUV Rinse Materials Revenue Market Share Forecast by Type (2027-2032)
Figure 100. Global EUV Rinse Materials Sales Market Share Forecast by Application (2027-2032)
Figure 101. Global EUV Rinse Materials Revenue Market Share Forecast by Application (2027-2032)

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