

Global Fluorinated Electronic Materials for Semiconductor Manufacturing Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Fluorinated Electronic Materials for Semiconductor Manufacturing market size is predicted to grow from US\$ 4436 million in 2025 to US\$ 7693 million in 2032; it is expected to grow at a CAGR of 8.0% from 2026 to 2032.

Fluorinated Electronic Materials for Semiconductor Manufacturing Processes refer to semiconductor-grade fluorine-containing gases, wet chemicals, fluoropolymers and electronic fluorinated liquids used in wafer fabrication, advanced packaging, wafer/device testing and semiconductor process equipment environments. These materials enable plasma dry etching, chamber cleaning, gas-phase deposition, wet oxide etching, wafer surface preparation, wet cleaning, ultra-clean chemical delivery, wet process contact, process equipment thermal control, chiller/TCU heat transfer, wafer-level testing and advanced packaging thermal testing. Under the narrow scope of this report, the industry covers four product families: fluorinated electronic specialty gases, fluorinated wet electronic chemicals, semiconductor-grade fluoropolymers and electronic fluorinated liquids. The defining criterion is not merely the presence of fluorine, but whether the material is directly used in semiconductor process, equipment or testing environments and qualified against semiconductor requirements for purity, particle control, trace metals, residues, clean packaging, supply continuity, EHS compliance and customer validation.

The current demand base is supported by higher process complexity in leading-edge logic, DRAM / HBM, 3D NAND, mature-node capacity expansion, power and compound semiconductors, and advanced packaging. Leading-edge logic and 3D NAND require more selective fluorocarbon etch gases, higher chamber-cleaning intensity, higher-purity HF / BOE systems and more advanced contamination-control materials. DRAM

and HBM drive demand for W deposition-related materials, high-aspect-ratio etch gases, chamber cleaning gases, wet surface preparation chemicals and thermal testing materials. Advanced packaging, wafer-level packaging, TSV and 2.5D / 3D integration are raising the strategic importance of electronic fluorinated liquids used in thermal testing and process temperature control. SEMI reported that global semiconductor materials revenue reached USD 73.2 billion in 2025, with wafer fab materials revenue at USD 45.8 billion, supported by higher process complexity, advanced-node demand, high-performance computing and HBM manufacturing investment.

From a product-route perspective, fluorinated electronic specialty gases remain one of the highest-value and most technically demanding categories. Key products include NF₃, WF₆, C₄F₆, C₄F₈, CF₄, CHF₃, CH₂F₂, SF₆, ClF₃ and F₂ / N₂. These gases are used in dielectric etching, high-aspect-ratio oxide etching, nitride etching, chamber cleaning and gas-phase deposition. The development trend is moving toward higher purity, lower moisture, lower metal contamination, more stable gas delivery, lower global warming potential, improved abatement compatibility and tighter integration with etch and deposition tool recipes. Fluorinated wet electronic chemicals, by contrast, are developing from standard HF, DHF, BOE / BHF and NH₄F supply toward more customized fluoride-based wet etchants, residue-removal chemistries and selective cleaning formulations. The value of this segment increasingly depends on selectivity, defect control, metal compatibility, low residue and customer-specific process co-development.

From a supply-chain perspective, the industry remains concentrated among global gas and electronic materials companies, Japanese fluorochemical and specialty chemical suppliers, Korean memory-chain suppliers and fast-growing Chinese domestic suppliers. Linde, Air Liquide, Air Products, Merck / EMD Electronics, Entegris, Chemours, BASF and Qnity Electronics represent the Western global supply base. Kanto Denka, Stella Chemifa, FUJIFILM Electronic Materials, Daikin, AGC, Resonac, Central Glass, Mitsui Chemicals and Nippon Sanso reflect Japan's long-standing strengths in fluorine chemistry, specialty gases, high-purity HF, fluoropolymers and advanced process materials. SK specialty, Foosung, Soulbrain and Hyosung Chemical are closely linked to Korean memory, display and advanced manufacturing ecosystems. In China, PERIC Special Gases, Haohua, Huate Gas, Jiangsu Nata, DFD New Materials, Jianghua Microelectronics, Zhongjuxin, Hubei Xingfu, Jinhong Gas, Kemeite and Capchem are expanding across NF₃, WF₆, C₄F₆, electronic-grade HF, BOE, fluorinated wet chemicals, fluoropolymers and electronic fluorinated liquids. The competitive focus is shifting from simple capacity addition toward semiconductor-grade

purification, stable batch quality, advanced-node qualification, local customer support and EHS-compliant supply.

From a technology and regulatory perspective, the industry is entering a period of structural transition. Fluorinated gases and fluorinated liquids are technically difficult to replace because they provide unique combinations of plasma reactivity, chemical inertness, corrosion resistance, dielectric strength, low viscosity, thermal stability and wide-temperature operation. SIA identifies PFAS-containing fluorinated heat transfer fluids as critical materials used in semiconductor manufacturing and testing applications, including process modules and process equipment chillers. However, PFAS regulation, high-GWP gas reduction, emissions management and customer sustainability requirements are reshaping product development and supplier selection. 3M's exit from PFAS manufacturing by the end of 2025, including fluoropolymers, fluorinated fluids and PFAS-based additive products, is accelerating requalification of alternative electronic fluorinated liquids and fluoropolymer supply chains. Over the next few years, the industry is expected to grow with advanced semiconductor manufacturing, but the winning suppliers will be those that combine high-purity manufacturing, process application know-how, global and regional supply reliability, regulatory compliance and credible low-emission or lower-environmental-impact product roadmaps.

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

This Insight Report provides a comprehensive analysis of the global Fluorinated Electronic Materials for Semiconductor Manufacturing landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Fluorinated Electronic Materials for Semiconductor Manufacturing portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fluorinated Electronic Materials for Semiconductor Manufacturing

market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fluorinated Electronic Materials for Semiconductor Manufacturing and breaks down the forecast By Product Family, By Wafer Fab Process 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 Fluorinated Electronic Materials for Semiconductor Manufacturing.

This report presents a comprehensive overview, market shares, and growth opportunities of Fluorinated Electronic Materials for Semiconductor Manufacturing market by product type, application, key players and key regions and countries.

Segmentation By Product Family:

Fluorinated Electronic Specialty Gases

Semiconductor-grade Fluoropolymers

Electronic Fluorinated Liquids

Fluorinated Wet Electronic Chemicals

Segmentation By Device Platform:

Leading-edge Logic and Foundry

Mature-node Logic and Specialty CMOS

DRAM / HBM

3D NAND

Analog, Power Management and Mixed-signal IC

Power and Compound Semiconductors

MEMS, Sensors and CIS

Advanced Packaging, WLP and TSV

Other Semiconductor Platforms

Segmentation By Chemical and Material Form:

Inorganic Fluorinated Specialty Gases and Gas-phase Precursors

Fluorocarbon and Hydrofluorocarbon Etch Gases

HF-based Base Wet Chemicals

Buffered and Formulated Fluoride Wet Etchants / Cleaners

Semiconductor-grade Fluoropolymer Resins and Compounds

Fluoropolymer Semi-finished Clean-contact Materials

PFPE and Perfluorinated High-purity Fluids

Other Directly Qualified Fluorinated Process Materials

Segmentation By Wafer Fab Process Application:

Plasma Dry Etching

Plasma Chamber Cleaning

Fluorinated Deposition and Gas-phase Precursor Use

Wet Oxide Etching and Surface Preparation

Wet Clean, Residue Removal and Selective Wet Etching

High-purity Chemical Delivery and Wet Process Contact

Thermal Management, Chiller Fluid and Thermal Testing

Other Fab-qualified Fluorinated Process Uses

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

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 analyzing the company's coverage, product portfolio, its market penetration.

Linde

Air Liquide

SK specialty

Kanto Denka

Merck (Versum Materials)

Entegris

Chemours

Daikin

AGC

Syensqo

Stella Chemifa

FUJIFILM Electronic Materials

Foosung

Soulbrain

PERIC Special Gases

Haohua Chemical Science & Technology

Huate Gas

Jiangsu Nata Opto-electronic Material

DFD New Materials

Jiangyin Jianghua Microelectronics Materials

Zhongjuxin Technology

Hubei Xingfu Electronic Materials

BASF

Qnity Electronics

Hyosung Chemical

Resonac

Air Products

Kemeite (Yoke Technology)

Nippon Sanso

Mitsui Chemicals

Solvay

Central Glass

Jinhong Gas

3M

Shenzhen Capchem Technology

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Figure 45. South Korea Fluorinated Electronic Materials for Semiconductor

Manufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 46. Southeast Asia Fluorinated Electronic Materials for Semiconductor

Manufacturing Market Size Growth 2021-2026 (\$ millions)

Figure 47. India Fluorinated Electronic Materials for Semiconductor Manufacturing

Market Size Growth 2021-2026 (\$ millions)

Figure 48. Australia Fluorinated Electronic Materials for Semiconductor Manufacturing

Market Size Growth 2021-2026 (\$ millions)

Figure 49. Europe Fluorinated Electronic Materials for Semiconductor Manufacturing

Market Size Market Share by Country in 2025

Figure 50. Europe Fluorinated Electronic Materials for Semiconductor Manufacturing

Market Size Market Share By Product Family (2021-2026)

Figure 51. Europe Fluorinated Electronic Materials for Semiconductor Manufacturing

Market Size Market Share By Wafer Fab Process Application (2021-2026)

Figure 52. Germany Fluorinated

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