

Global Fluorosilicic Acid Market Growth 2026-2032

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Abstracts

The global Fluorosilicic Acid market size is predicted to grow from US\$ 558 million in 2025 to US\$ 659 million in 2032; it is expected to grow at a CAGR of 2.6% from 2026 to 2032.

Fluorosilicic acid is a strongly corrosive inorganic acid existing in aqueous solution form. It is mainly recovered as a by-product from phosphate fertilizer manufacturing, and can also be synthetically produced from hydrofluoric acid and silica raw materials. The product is commonly applied in drinking water fluoridation, production of various fluoride chemicals and industrial metal surface treatment.

Fluorosilicic acid prices (2026) range from USD 120?200/ton for 30?40% industrial grade, with NSF drinking water grade at USD 300?450/ton and electronic grade exceeding USD 800/ton, fluctuating with phosphate rock and hydrofluoric acid costs. The upstream relies mainly on phosphate fertilizer by-products (72% of supply), plus synthetic routes using hydrofluoric acid and silica. Midstream features global producers like Solvay, LANXESS, and Chinese leaders such as Xingfa and Sanmei. Downstream covers water fluoridation, fluoride salt production (sodium fluoride, cryolite), and metal surface treatment, with Asia-Pacific dominating 67% of global output. The chain is driven by phosphorus-fluorine integration and high-purity demand growth.

Market Driving Factors

First, institutionalized public health policies endorsed by the WHO have underpinned mandatory water fluoridation projects across North America, Latin America and Southeast Asia. Boasting prominent cost and scale advantages, fluorosilicic acid has become the dominant fluoridation chemical, with this application accounting for over half of global total demand and showing strong counter-cyclical features. Ongoing urbanization in emerging economies and continuous construction of new water plants

further generate incremental purchasing demand.

Second, global environmental regulations push phosphate producers to recycle fluorine-containing waste gas into usable fluorosilicic acid under circular economy guidelines. Integrated phosphorus-fluorine manufacturers gain substantial cost edges with zero purchased raw material for by-product output, while supportive circular economy policies fuel capacity expansion and consolidate the supply base for bulk industrial fluorosilicic acid.

Third, expanding electrolytic aluminum capacity drives steady consumption of industrial-grade fluorosilicic acid for aluminum fluoride production. Rapid expansion of photovoltaic polysilicon, semiconductor wafer etching and lithium battery fine additives boosts robust demand for high-purity electronic grades. Attractive premium profits prompt leading manufacturers to invest in refining technology and lift product added value.

Fourth, compared with solid fluorinated alternatives such as sodium fluoride, liquid fluorosilicic acid enables automatic dosing in water treatment and lowers comprehensive usage costs, accelerating downstream substitution. Advances in synthetic process also cut high-purity production costs and expand applications in fine chemicals, electroplating and stone finishing.

Market Challenges

First, more than 70% of global fluorosilicic acid is recovered as phosphate by-product. Prices of phosphate rock, sulfuric acid and fluorspar fluctuate sharply due to geopolitical export restrictions, mining environmental limits and energy inflation. Variable operating rates of phosphate fertilizer plants trigger periodic oversupply or supply shortage of fluorosilicic acid, causing drastic price volatility and squeezing industrial profits. The synthetic route relying on hydrofluoric acid and quartz sand also faces climbing costs from tightened fluorspar quota management.

Second, fluorosilicic acid is highly corrosive and prone to decomposing into hazardous hydrogen fluoride. Strict regulatory frameworks including EU REACH, North American environmental codes and global hazardous chemical rules keep lifting pollutant discharge standards, driving up enterprises' environmental investment by 8%-14%. Smaller factories lacking funds for environmental upgrades are forced to reduce output or exit the market. Rigorous approval rules for hazardous chemical land and maritime transportation raise cross-border logistics expenses and hinder international product

circulation.

Third, heated disputes over potential health risks of fluoridation have prompted some Western jurisdictions to suspend or abolish municipal water fluoridation policies, shrinking regional demand. New fluorine-free water treatment additives and solid fluorinating reagents gradually substitute traditional fluorosilicic acid and erode existing market space.

Fourth, core purification and stable storage technologies for ultra-high-purity electronic-grade fluorosilicic acid are monopolized by a small number of European and Japanese firms such as Solvay, Morita and Stella Chemifa. Most domestic manufacturers can only produce low-margin industrial-grade goods and rely heavily on imports for high-end products. Outdated equipment and poor impurity control among mid-small players prevent access to premium NSF-certified drinking-water and electronic-grade orders, triggering vicious homogeneous price competition across the industry.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fluorosilicic Acid 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 Fluorosilicic Acid.

This report presents a comprehensive overview, market shares, and growth

opportunities of Fluorosilicic Acid market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

20%?25%

38%?40%

Other

Segmentation by Product Purity Grade:

Industrial Grade

NSF Drinking Water Grade

High Purity Fine Processing Grade

Other

Segmentation by Application:

Water Treatment

Fluoride Raw Material

Surface Treatment

Other

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

Solvay

DDF

LANXESS

PVS Chemicals

Zhejiang Sanmei Chemical

Morita Chemical Industries

Stella Chemifa Corporation

Foshan Nanhai Shuangfu Chemical

Jiangxi China Fluorine Chemicals

FCY

Fengyuan Group

Xinxiang Yellow River Fine Chemicals

IXOM

Hubei Xingfa Group

Nantong Jinxing Fluorine

Shangrao Comprehensive Fluoride Chemical

Borden & Remington

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fluorosilicic Acid market?

What factors are driving Fluorosilicic Acid market growth, globally and by region?

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

How do Fluorosilicic Acid market opportunities vary by end market size?

How does Fluorosilicic Acid break out by Type, by Application?

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