

Global Nitrosyl Fluoride Gas Market Growth 2026-2032

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Abstracts

The global Nitrosyl Fluoride Gas market size is predicted to grow from US\$ 7.66 million in 2025 to US\$ 19.64 million in 2032; it is expected to grow at a CAGR of 13.5% from 2026 to 2032.

In 2025, global Nitrosyl Fluoride Gas capacity 10 Tons, sales reached approximately 9 Tons, with an average market price of around 870 USD/Kg, industrial gross margin 41%.

Nitrosyl fluoride is a highly reactive fluorine-containing nitrogen oxide whose commercial value is increasingly tied to differentiated semiconductor etch chemistry rather than conventional bulk fluorination. The molecule has a molecular weight of 49.0045 g/mol and a normal boiling point of approximately -59.9°C , making containment, purification and delivery central elements of the product proposition. Semiconductor-oriented technology covers purity levels from $\geq 99\%$ to $>99.99\%$ and $>99.999\%$, with tighter specifications extending beyond headline assay to F_2/NO , nitrogen oxides, moisture and other trace gases. Air Liquide's process disclosures, for example, contemplate F_2/NO below 1%, with preferred thresholds of 0.1% and 0.01%, while water can be controlled below 20 ppmw in high-selectivity etch applications. This study defines the addressable market as merchant industrial- and electronic-grade NOF, including commercial NOF-containing process mixtures on a 100%-NOF-equivalent basis, while excluding laboratory reagents, analytical standards and NOF generated in situ inside customer processes without a merchant-gas transaction.

The industrial technology stack has moved beyond basic synthesis toward high-purity conversion, by-product suppression, cylinder compatibility and reproducible point-of-use delivery. Direct reaction of fluorine with nitric oxide— $\text{F}_2 + 2\text{NO} \rightarrow 2\text{FNO}$ —is one of the most relevant routes for electronic-grade production, with F_2/NO ratios controlled at or below 1/2 to suppress formation of F_2/NO . Recent Chinese process development uses

the same underlying chemistry while diluting fluorine with inert gas and precooling the feed before reaction. Alternative industrial pathways include NO/O₂/HF chemistry producing NOF in an HF medium for aromatic fluorination, as well as legacy nitrosyl-sulfuric-acid/HF and nitrite/HF processes. For semiconductor supply, however, competitive advantage resides less in the stoichiometry than in deep purification, trace-gas analytics, moisture control, surface passivation and packaging. Air Liquide has disclosed Ni-P-coated 4130X cylinders and compatible high-cleanliness delivery hardware, while Resonac has demonstrated kilogram-scale NOF storage in a 10-liter vessel and storage-pressure windows extending from 0.05 to 5 MPa.

Selective dry etching of silicon nitride in advanced memory architectures is the clearest commercial use case, because increasingly complex 3D structures place a premium on material selectivity rather than fluorine-radical generation alone. Air Liquide's disclosed process space covers SiN or polysilicon selectivity to SiO₂ of roughly 10–3,000, with narrower preferred ranges of 20–2,000, and high-aspect-ratio structures extending from approximately 10:1 to 1,000:1. SK Specialty has separately disclosed FNO reaction-gas concentrations of at least 20 vol%, preferably at least 25 vol%, with plasma-processing pressures around 100 mTorr to 1 Torr. These conditions shift procurement criteria toward controlled impurity fingerprints, premix consistency, cylinder stability, flow repeatability and wafer-level process qualification. Outside semiconductors, NOF chemistry is also applicable to diazotization/fluorination routes for aryl fluorides, while 2025 research has investigated NOF-based GaN surface treatment; both remain secondary to semiconductor etch as merchant-gas demand drivers.

The competitive landscape remains unusually narrow, with only a small group of specialty-gas companies showing verifiable NOF-specific process, storage or semiconductor-application capability. Air Liquide has the broadest publicly visible portfolio across selective etching and F₂/NO-controlled storage and supply; Resonac has developed an increasingly integrated patent estate around etching, storage and gas analysis; and SK Specialty disclosed dedicated FNO etch technology in 2025. The ownership structure of the Korean platform changed materially on March 31, 2025, when Hahn & Company completed the acquisition of an 85% interest in SK Specialty from SK Inc, while SK retained 15%; the transaction valued the company at approximately KRW4.172 trillion, with roughly KRW2.7 trillion attributed to the shares sold. Although this was a platform-level specialty-gas transaction rather than an NOF-specific acquisition, it transferred control of an FNO technology participant to a private-equity owner. In China, Huate Gas published a dedicated NOF preparation patent in 2026, while India's Deepak Nitrite has developed a separate NOF/HF route focused on industrial fluorination chemistry.

The next phase of market development will be determined by process insertion in advanced NAND, qualification of second sources and conversion of laboratory-scale or patent-stage chemistry into stable multi-region electronic-gas supply. Demand growth is likely to be concentrated in high-layer-count 3D NAND and other structures where high-aspect-ratio etching and SiN/SiO₂ selectivity become more demanding. Technology development will emphasize 4N–5N-plus purity, lower F₂/NO and moisture, premixed concentrations, lower on-site hazardous inventory and more robust cylinder passivation. Supply-chain competition should favor incumbent electronic-gas companies with integrated F₂/NO sourcing, ultratrace analytics, customer-audit systems and local fab logistics, while Chinese localization creates an additional route for qualification-driven share gains. The principal constraints remain difficult handling, relatively long fab qualification cycles, a limited number of process steps, and continued competition from NF₃, F₂, other fluorinated etchants and in-situ NOF generation.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nitrosyl Fluoride Gas and breaks down the forecast by Purity, 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 Nitrosyl Fluoride Gas.

This report presents a comprehensive overview, market shares, and growth opportunities of Nitrosyl Fluoride Gas market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Purity:

99%

99.9%

Segmentation by Grade:

Industrial Grade

Electronic Grade

Segmentation by Application:

Semiconductor Etch

Fluoroaromatic Synthesis

Others

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.

Air Liquide

Resonac

Guangdong Huate Gas

Key Questions Addressed in this Report

What is the 10-year outlook for the global Nitrosyl Fluoride Gas market?

What factors are driving Nitrosyl Fluoride Gas market growth, globally and by region?

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

How do Nitrosyl Fluoride Gas market opportunities vary by end market size?

How does Nitrosyl Fluoride Gas break out by Purity, by Application?

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