

Global Radiation-Hardened Electronic Material Market Growth 2026-2032

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Abstracts

The global Radiation-Hardened Electronic Material market size is predicted to grow from US\$ 1820 million in 2025 to US\$ 3325 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

Radiation-Hardened Electronic Materials are high-reliability physical materials designed for electronic systems operating in radiation-intensive and mission-critical environments. The category mainly serves satellite electronics, space payloads, deep-space probes, nuclear industry electronics, particle detection systems, defense electronics, high-reliability communications, and aerospace control systems. The core property of these materials is their ability to maintain stable electrical, thermal, dielectric, mechanical, and protective performance under total ionizing dose, single-event effects, displacement damage, proton, electron, neutron, gamma-ray exposure, vacuum thermal cycling, and severe electromagnetic interference. The research scope mainly covers radiation-hardened or radiation-tolerant semiconductor substrates and epitaxial materials, space-grade polyimide films, high-reliability printed circuit board base materials, low-outgassing encapsulants, potting compounds, conformal coatings, ceramic packaging substrates, thermally conductive insulating materials, electromagnetic shielding materials, and radiation shielding composites. Major product forms include wafers, epitaxial wafers, films, laminates, copper-clad laminates, adhesives, encapsulation compounds, coating materials, ceramic sheets, composite sheets, and shielding gaskets. Key manufacturing processes include SOI wafer preparation, epitaxial growth, crystal growth, ion implantation, chemical imidization, biaxial stretching, resin modification, low-outgassing curing, ceramic sintering, metal-filled composite processing, conductive filler dispersion, and surface treatment. Important technical parameters generally include total ionizing dose tolerance, low-outgassing performance, dielectric constant, dissipation factor, thermal conductivity, volume resistivity,

breakdown strength, coefficient of thermal expansion, thickness uniformity, wafer bow, cleanliness, and lot-to-lot consistency. The essential function of these materials is to improve the service life, operational stability, signal integrity, insulation reliability, thermal management, and packaging robustness of electronic devices, electronic modules, and interconnect systems exposed to radiation, vacuum, temperature cycling, and strong interference. On a revenue-weighted standard material equivalent basis, the 2025 global average industry price of Radiation-Hardened Electronic Materials is estimated at about USD 305 per kilogram, and the 2025 global average gross margin is estimated at about 42.00%.

The upstream value chain of Radiation-Hardened Electronic Materials is built on high-purity silicon, silicon carbide crystals, gallium, arsenic, indium, polyimide monomers, specialty resins, ceramic powders, metallic fillers, conductive fillers, siloxanes, and functional additives. The midstream segment covers wafer and epitaxial wafer manufacturing, polyimide film processing, high-reliability circuit substrate lamination, low-outgassing encapsulant formulation, ceramic package sintering, shielding composite processing, and electronic protection material production. The downstream market is concentrated in satellite platforms, space payloads, nuclear industry electronics, high-energy physics detectors, defense electronics, and aerospace electronic systems that require long-term reliability under radiation and harsh operating conditions.

The competitive structure is characterized by multiple material systems rather than a single homogeneous product category. Semiconductor substrates and epitaxial materials, polyimide films, high-reliability PCB base materials, packaging protection materials, ceramic package materials, and shielding materials serve different technical functions, while jointly improving the reliability of electronics used in radiation environments. North America remains strong in space-grade encapsulation, wide-bandgap materials, EMI shielding, and high-reliability electronic materials. Japan has deep capabilities in polyimide films, ceramic packaging, and electronic resins. Europe has a solid position in SOI, specialty silicon wafers, advanced ceramics, and high-performance engineered materials. China is accelerating its presence in SOI, SiC, polyimide films, and electronic packaging materials.

In terms of application structure, satellite electronics and space payloads form the most visible and stable demand base. Low Earth orbit constellations, remote sensing satellites, communication satellites, navigation enhancement systems, deep-space missions, and space science programs are increasing requirements for batch consistency, traceability, and long-cycle material reliability. Nuclear industry electronics and high-energy physics facilities are smaller in volume but have stricter requirements

for radiation stability, long-term durability, and customized qualification. Defense electronics place greater emphasis on supply chain security, local sourcing, and mission assurance, shifting competition from individual material performance toward reliability data, qualification history, process consistency, and secure delivery capability.

The policy and capital environment is reinforcing the strategic role of this industry. Semiconductor supply chain security, national space programs, commercial space expansion, nuclear infrastructure upgrades, and defense electronics modernization are encouraging regionalized material supply and localized production. Global semiconductor sales and silicon wafer shipments remain at a high level, while the space economy continues to expand, creating a long-term demand base for radiation-hardened electronic materials. At the same time, industry consolidation, electronic materials business restructuring, wide-bandgap material capacity expansion, new space-grade adhesive products, and investment in high-reliability electronic substrates are reshaping regional supply structures and raising entry barriers for new participants.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Radiation-Hardened Electronic Material 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 Radiation-Hardened

Electronic Material.

This report presents a comprehensive overview, market shares, and growth opportunities of Radiation-Hardened Electronic Material market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Wafers and Substrates

Epitaxial Wafers

Films

Laminates and Copper-clad Laminates

Adhesives and Encapsulants

Conformal Coatings

Others

Segmentation by Radiation Reliability Requirement:

Total Ionizing Dose Resistant

Single Event Effect Mitigation

Displacement Damage Resistant

Low Outgassing Space-grade Materials

Environmental Reliability Support Materials

Others

Segmentation by Application:

Satellite Platform Electronics

Space Payload Electronics

Deep Space and Space Science Systems

Nuclear Industry Electronics

Particle Detection and Research Electronics

Defense and Strategic Electronics

Aerospace Avionics

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.

Soitec

GlobalWafers Co., Ltd.

SUMCO Corporation

Okmetic Oy

Shanghai Simgui Technology Co., Ltd.

Zhonghuan Advanced Semiconductor Materials Co., Ltd.

Wolfspeed, Inc.

Coherent Corp.

SK siltron css

onsemi

SICC Co., Ltd.

Tankeblue Semiconductor Co., Ltd.

Sanan Semiconductor Co., Ltd.

AXT, Inc.

Freiberger Compound Materials GmbH

Sumitomo Electric Industries, Ltd.

IQE plc

Qnity Electronics, Inc.

UBE Corporation

Kaneka Corporation

PI Advanced Materials Co., Ltd.

Shenzhen Rayitek Hi-Tech Film Co., Ltd.

Zhuzhou Times Huaxin New Material Technology Co., Ltd.

Arlon Electronic Materials

Rogers Corporation

Isola Group

Panasonic Holdings Corporation

Dow Inc.

Momentive Performance Materials Inc.

Avantor, Inc.

Wacker Chemie AG

Henkel AG & Co. KGaA

Shin-Etsu Chemical Co., Ltd.

3M Company

Parker Hannifin Corporation

Laird Performance Materials

Heraeus Holding GmbH

Key Questions Addressed in this Report

What is the 10-year outlook for the global Radiation-Hardened Electronic Material market?

What factors are driving Radiation-Hardened Electronic Material market growth, globally and by region?

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

How do Radiation-Hardened Electronic Material market opportunities vary by end market size?

How does Radiation-Hardened Electronic Material break out by Type, by Application?

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 Radiation-Hardened Electronic Material Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Radiation-Hardened Electronic Material by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Radiation-Hardened Electronic Material by Country/Region, 2021, 2025 & 2032
- 2.2 Radiation-Hardened Electronic Material Segment by Type
 - 2.2.1 Wafers and Substrates
 - 2.2.2 Epitaxial Wafers
 - 2.2.3 Films
 - 2.2.4 Laminates and Copper-clad Laminates
 - 2.2.5 Adhesives and Encapsulants
 - 2.2.6 Conformal Coatings
 - 2.2.7 Others
 - 2.2.8 Radiation-Hardened Electronic Material Sales by Type
 - 2.2.8.1 Global Radiation-Hardened Electronic Material Sales Market Share by Type (2021-2026)
 - 2.2.8.2 Global Radiation-Hardened Electronic Material Revenue and Market Share by Type (2021-2026)
 - 2.2.8.3 Global Radiation-Hardened Electronic Material Sale Price by Type (2021-2026)
- 2.3 Radiation-Hardened Electronic Material Segment by Radiation Reliability Requirement
 - 2.3.1 Total Ionizing Dose Resistant

2.3.2 Single Event Effect Mitigation

2.3.3 Displacement Damage Resistant

2.3.4 Low Outgassing Space-grade Materials

2.3.5 Environmental Reliability Support Materials

2.3.6 Others

2.3.7 Radiation-Hardened Electronic Material Sales by Radiation Reliability Requirement

2.3.7.1 Global Radiation-Hardened Electronic Material Sales Market Share by Radiation Reliability Requirement (2021-2026)

2.3.7.2 Global Radiation-Hardened Electronic Material Revenue and Market Share by Radiation Reliability Requirement (2021-2026)

2.3.7.3 Global Radiation-Hardened Electronic Material Sale Price by Radiation Reliability Requirement (2021-2026)

2.4 Radiation-Hardened Electronic Material Segment by Application

2.4.1 Satellite Platform Electronics

2.4.2 Space Payload Electronics

2.4.3 Deep Space and Space Science Systems

2.4.4 Nuclear Industry Electronics

2.4.5 Particle Detection and Research Electronics

2.4.6 Defense and Strategic Electronics

2.4.7 Aerospace Avionics

2.4.8 Others

2.4.9 Radiation-Hardened Electronic Material Sales by Application

2.4.9.1 Global Radiation-Hardened Electronic Material Sale Market Share by Application (2021-2026)

2.4.9.2 Global Radiation-Hardened Electronic Material Revenue and Market Share by Application (2021-2026)

2.4.9.3 Global Radiation-Hardened Electronic Material Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Radiation-Hardened Electronic Material Breakdown Data by Company

3.1.1 Global Radiation-Hardened Electronic Material Annual Sales by Company (2021-2026)

3.1.2 Global Radiation-Hardened Electronic Material Sales Market Share by Company (2021-2026)

3.2 Global Radiation-Hardened Electronic Material Annual Revenue by Company (2021-2026)

- 3.2.1 Global Radiation-Hardened Electronic Material Revenue by Company (2021-2026)
- 3.2.2 Global Radiation-Hardened Electronic Material Revenue Market Share by Company (2021-2026)
- 3.3 Global Radiation-Hardened Electronic Material Sale Price by Company
- 3.4 Key Manufacturers Radiation-Hardened Electronic Material Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Radiation-Hardened Electronic Material Product Location Distribution
 - 3.4.2 Players Radiation-Hardened Electronic Material 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 RADIATION-HARDENED ELECTRONIC MATERIAL BY GEOGRAPHIC REGION

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

5 AMERICAS

- 5.1 Americas Radiation-Hardened Electronic Material Sales by Country

- 5.1.1 Americas Radiation-Hardened Electronic Material Sales by Country (2021-2026)
- 5.1.2 Americas Radiation-Hardened Electronic Material Revenue by Country (2021-2026)
- 5.2 Americas Radiation-Hardened Electronic Material Sales by Type (2021-2026)
- 5.3 Americas Radiation-Hardened Electronic Material Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Radiation-Hardened Electronic Material Sales by Region
 - 6.1.1 APAC Radiation-Hardened Electronic Material Sales by Region (2021-2026)
 - 6.1.2 APAC Radiation-Hardened Electronic Material Revenue by Region (2021-2026)
- 6.2 APAC Radiation-Hardened Electronic Material Sales by Type (2021-2026)
- 6.3 APAC Radiation-Hardened Electronic Material 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 Radiation-Hardened Electronic Material by Country
 - 7.1.1 Europe Radiation-Hardened Electronic Material Sales by Country (2021-2026)
 - 7.1.2 Europe Radiation-Hardened Electronic Material Revenue by Country (2021-2026)
- 7.2 Europe Radiation-Hardened Electronic Material Sales by Type (2021-2026)
- 7.3 Europe Radiation-Hardened Electronic Material 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 Radiation-Hardened Electronic Material by Country

8.1.1 Middle East & Africa Radiation-Hardened Electronic Material Sales by Country (2021-2026)

8.1.2 Middle East & Africa Radiation-Hardened Electronic Material Revenue by Country (2021-2026)

8.2 Middle East & Africa Radiation-Hardened Electronic Material Sales by Type (2021-2026)

8.3 Middle East & Africa Radiation-Hardened Electronic Material 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 Radiation-Hardened Electronic Material

10.3 Manufacturing Process Analysis of Radiation-Hardened Electronic Material

10.4 Industry Chain Structure of Radiation-Hardened Electronic Material

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Radiation-Hardened Electronic Material Distributors

11.3 Radiation-Hardened Electronic Material Customer

12 WORLD FORECAST REVIEW FOR RADIATION-HARDENED ELECTRONIC

MATERIAL BY GEOGRAPHIC REGION

12.1 Global Radiation-Hardened Electronic Material Market Size Forecast by Region

12.1.1 Global Radiation-Hardened Electronic Material Forecast by Region (2027-2032)

12.1.2 Global Radiation-Hardened Electronic Material 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 Radiation-Hardened Electronic Material Forecast by Type (2027-2032)

12.7 Global Radiation-Hardened Electronic Material Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Soitec

13.1.1 Soitec Company Information

13.1.2 Soitec Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.1.3 Soitec Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Soitec Main Business Overview

13.1.5 Soitec Latest Developments

13.2 GlobalWafers Co., Ltd.

13.2.1 GlobalWafers Co., Ltd. Company Information

13.2.2 GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.2.3 GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 GlobalWafers Co., Ltd. Main Business Overview

13.2.5 GlobalWafers Co., Ltd. Latest Developments

13.3 SUMCO Corporation

13.3.1 SUMCO Corporation Company Information

13.3.2 SUMCO Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.3.3 SUMCO Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 SUMCO Corporation Main Business Overview

- 13.3.5 SUMCO Corporation Latest Developments
- 13.4 Okmetic Oy
 - 13.4.1 Okmetic Oy Company Information
 - 13.4.2 Okmetic Oy Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.4.3 Okmetic Oy Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Okmetic Oy Main Business Overview
 - 13.4.5 Okmetic Oy Latest Developments
- 13.5 Shanghai Simgui Technology Co., Ltd.
 - 13.5.1 Shanghai Simgui Technology Co., Ltd. Company Information
 - 13.5.2 Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.5.3 Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Shanghai Simgui Technology Co., Ltd. Main Business Overview
 - 13.5.5 Shanghai Simgui Technology Co., Ltd. Latest Developments
- 13.6 Zhonghuan Advanced Semiconductor Materials Co., Ltd.
 - 13.6.1 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Company Information
 - 13.6.2 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.6.3 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Main Business Overview
 - 13.6.5 Zhonghuan Advanced Semiconductor Materials Co., Ltd. Latest Developments
- 13.7 Wolfspeed, Inc.
 - 13.7.1 Wolfspeed, Inc. Company Information
 - 13.7.2 Wolfspeed, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.7.3 Wolfspeed, Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Wolfspeed, Inc. Main Business Overview
 - 13.7.5 Wolfspeed, Inc. Latest Developments
- 13.8 Coherent Corp.
 - 13.8.1 Coherent Corp. Company Information
 - 13.8.2 Coherent Corp. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.8.3 Coherent Corp. Radiation-Hardened Electronic Material Sales, Revenue, Price

and Gross Margin (2021-2026)

13.8.4 Coherent Corp. Main Business Overview

13.8.5 Coherent Corp. Latest Developments

13.9 SK siltron css

13.9.1 SK siltron css Company Information

13.9.2 SK siltron css Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.9.3 SK siltron css Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 SK siltron css Main Business Overview

13.9.5 SK siltron css Latest Developments

13.10 onsemi

13.10.1 onsemi Company Information

13.10.2 onsemi Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.10.3 onsemi Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 onsemi Main Business Overview

13.10.5 onsemi Latest Developments

13.11 SICC Co., Ltd.

13.11.1 SICC Co., Ltd. Company Information

13.11.2 SICC Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.11.3 SICC Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 SICC Co., Ltd. Main Business Overview

13.11.5 SICC Co., Ltd. Latest Developments

13.12 Tankeblue Semiconductor Co., Ltd.

13.12.1 Tankeblue Semiconductor Co., Ltd. Company Information

13.12.2 Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.12.3 Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Tankeblue Semiconductor Co., Ltd. Main Business Overview

13.12.5 Tankeblue Semiconductor Co., Ltd. Latest Developments

13.13 Sanan Semiconductor Co., Ltd.

13.13.1 Sanan Semiconductor Co., Ltd. Company Information

13.13.2 Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.13.3 Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Sanan Semiconductor Co., Ltd. Main Business Overview

13.13.5 Sanan Semiconductor Co., Ltd. Latest Developments

13.14 AXT, Inc.

13.14.1 AXT, Inc. Company Information

13.14.2 AXT, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.14.3 AXT, Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 AXT, Inc. Main Business Overview

13.14.5 AXT, Inc. Latest Developments

13.15 Freiberger Compound Materials GmbH

13.15.1 Freiberger Compound Materials GmbH Company Information

13.15.2 Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.15.3 Freiberger Compound Materials GmbH Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Freiberger Compound Materials GmbH Main Business Overview

13.15.5 Freiberger Compound Materials GmbH Latest Developments

13.16 Sumitomo Electric Industries, Ltd.

13.16.1 Sumitomo Electric Industries, Ltd. Company Information

13.16.2 Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.16.3 Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Sumitomo Electric Industries, Ltd. Main Business Overview

13.16.5 Sumitomo Electric Industries, Ltd. Latest Developments

13.17 IQE plc

13.17.1 IQE plc Company Information

13.17.2 IQE plc Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.17.3 IQE plc Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 IQE plc Main Business Overview

13.17.5 IQE plc Latest Developments

13.18 Qnity Electronics, Inc.

13.18.1 Qnity Electronics, Inc. Company Information

13.18.2 Qnity Electronics, Inc. Radiation-Hardened Electronic Material Product

Portfolios and Specifications

13.18.3 Qnity Electronics, Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Qnity Electronics, Inc. Main Business Overview

13.18.5 Qnity Electronics, Inc. Latest Developments

13.19 UBE Corporation

13.19.1 UBE Corporation Company Information

13.19.2 UBE Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.19.3 UBE Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 UBE Corporation Main Business Overview

13.19.5 UBE Corporation Latest Developments

13.20 Kaneka Corporation

13.20.1 Kaneka Corporation Company Information

13.20.2 Kaneka Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.20.3 Kaneka Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Kaneka Corporation Main Business Overview

13.20.5 Kaneka Corporation Latest Developments

13.21 PI Advanced Materials Co., Ltd.

13.21.1 PI Advanced Materials Co., Ltd. Company Information

13.21.2 PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.21.3 PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 PI Advanced Materials Co., Ltd. Main Business Overview

13.21.5 PI Advanced Materials Co., Ltd. Latest Developments

13.22 Shenzhen Rayitek Hi-Tech Film Co., Ltd.

13.22.1 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Company Information

13.22.2 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.22.3 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Main Business Overview

13.22.5 Shenzhen Rayitek Hi-Tech Film Co., Ltd. Latest Developments

13.23 Zhuzhou Times Huaxin New Material Technology Co., Ltd.

13.23.1 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Company

Information

13.23.2 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.23.3 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Main Business Overview

13.23.5 Zhuzhou Times Huaxin New Material Technology Co., Ltd. Latest Developments

13.24 Arlon Electronic Materials

13.24.1 Arlon Electronic Materials Company Information

13.24.2 Arlon Electronic Materials Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.24.3 Arlon Electronic Materials Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Arlon Electronic Materials Main Business Overview

13.24.5 Arlon Electronic Materials Latest Developments

13.25 Rogers Corporation

13.25.1 Rogers Corporation Company Information

13.25.2 Rogers Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.25.3 Rogers Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Rogers Corporation Main Business Overview

13.25.5 Rogers Corporation Latest Developments

13.26 Isola Group

13.26.1 Isola Group Company Information

13.26.2 Isola Group Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.26.3 Isola Group Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 Isola Group Main Business Overview

13.26.5 Isola Group Latest Developments

13.27 Panasonic Holdings Corporation

13.27.1 Panasonic Holdings Corporation Company Information

13.27.2 Panasonic Holdings Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.27.3 Panasonic Holdings Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.27.4 Panasonic Holdings Corporation Main Business Overview
- 13.27.5 Panasonic Holdings Corporation Latest Developments
- 13.28 Dow Inc.
 - 13.28.1 Dow Inc. Company Information
 - 13.28.2 Dow Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.28.3 Dow Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Dow Inc. Main Business Overview
 - 13.28.5 Dow Inc. Latest Developments
- 13.29 Momentive Performance Materials Inc.
 - 13.29.1 Momentive Performance Materials Inc. Company Information
 - 13.29.2 Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.29.3 Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.29.4 Momentive Performance Materials Inc. Main Business Overview
 - 13.29.5 Momentive Performance Materials Inc. Latest Developments
- 13.30 Avantor, Inc.
 - 13.30.1 Avantor, Inc. Company Information
 - 13.30.2 Avantor, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.30.3 Avantor, Inc. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.30.4 Avantor, Inc. Main Business Overview
 - 13.30.5 Avantor, Inc. Latest Developments
- 13.31 Wacker Chemie AG
 - 13.31.1 Wacker Chemie AG Company Information
 - 13.31.2 Wacker Chemie AG Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.31.3 Wacker Chemie AG Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.31.4 Wacker Chemie AG Main Business Overview
 - 13.31.5 Wacker Chemie AG Latest Developments
- 13.32 Henkel AG & Co. KGaA
 - 13.32.1 Henkel AG & Co. KGaA Company Information
 - 13.32.2 Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Product Portfolios and Specifications
 - 13.32.3 Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Sales,

Revenue, Price and Gross Margin (2021-2026)

13.32.4 Henkel AG & Co. KGaA Main Business Overview

13.32.5 Henkel AG & Co. KGaA Latest Developments

13.33 Shin-Etsu Chemical Co., Ltd.

13.33.1 Shin-Etsu Chemical Co., Ltd. Company Information

13.33.2 Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Product

Portfolios and Specifications

13.33.3 Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.33.4 Shin-Etsu Chemical Co., Ltd. Main Business Overview

13.33.5 Shin-Etsu Chemical Co., Ltd. Latest Developments

13.34 3M Company

13.34.1 3M Company Company Information

13.34.2 3M Company Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.34.3 3M Company Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.34.4 3M Company Main Business Overview

13.34.5 3M Company Latest Developments

13.35 Parker Hannifin Corporation

13.35.1 Parker Hannifin Corporation Company Information

13.35.2 Parker Hannifin Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.35.3 Parker Hannifin Corporation Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.35.4 Parker Hannifin Corporation Main Business Overview

13.35.5 Parker Hannifin Corporation Latest Developments

13.36 Laird Performance Materials

13.36.1 Laird Performance Materials Company Information

13.36.2 Laird Performance Materials Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.36.3 Laird Performance Materials Radiation-Hardened Electronic Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.36.4 Laird Performance Materials Main Business Overview

13.36.5 Laird Performance Materials Latest Developments

13.37 Heraeus Holding GmbH

13.37.1 Heraeus Holding GmbH Company Information

13.37.2 Heraeus Holding GmbH Radiation-Hardened Electronic Material Product Portfolios and Specifications

13.37.3 Heraeus Holding GmbH Radiation-Hardened Electronic Material Sales,
Revenue, Price and Gross Margin (2021-2026)

13.37.4 Heraeus Holding GmbH Main Business Overview

13.37.5 Heraeus Holding GmbH Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Radiation-Hardened Electronic Material Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Radiation-Hardened Electronic Material Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Wafers and Substrates

Table 4. Major Players of Epitaxial Wafers

Table 5. Major Players of Films

Table 6. Major Players of Laminates and Copper-clad Laminates

Table 7. Major Players of Adhesives and Encapsulants

Table 8. Major Players of Conformal Coatings

Table 9. Major Players of Others

Table 10. Global Radiation-Hardened Electronic Material Sales by Type (2021-2026) & (Kilotons)

Table 11. Global Radiation-Hardened Electronic Material Sales Market Share by Type (2021-2026)

Table 12. Global Radiation-Hardened Electronic Material Revenue by Type (2021-2026) & (\$ million)

Table 13. Global Radiation-Hardened Electronic Material Revenue Market Share by Type (2021-2026)

Table 14. Global Radiation-Hardened Electronic Material Sale Price by Type (2021-2026) & (US\$/kg)

Table 15. Major Players of Total Ionizing Dose Resistant

Table 16. Major Players of Single Event Effect Mitigation

Table 17. Major Players of Displacement Damage Resistant

Table 18. Major Players of Low Outgassing Space-grade Materials

Table 19. Major Players of Environmental Reliability Support Materials

Table 20. Major Players of Others

Table 21. Global Radiation-Hardened Electronic Material Sales by Radiation Reliability Requirement (2021-2026) & (Kilotons)

Table 22. Global Radiation-Hardened Electronic Material Sales Market Share by Radiation Reliability Requirement (2021-2026)

Table 23. Global Radiation-Hardened Electronic Material Revenue by Radiation Reliability Requirement (2021-2026) & (\$ million)

Table 24. Global Radiation-Hardened Electronic Material Revenue Market Share by Radiation Reliability Requirement (2021-2026)

Table 25. Global Radiation-Hardened Electronic Material Sale Price by Radiation Reliability Requirement (2021-2026) & (US\$/kg)

Table 26. Global Radiation-Hardened Electronic Material Sale by Application (2021-2026) & (Kilotons)

Table 27. Global Radiation-Hardened Electronic Material Sale Market Share by Application (2021-2026)

Table 28. Global Radiation-Hardened Electronic Material Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Radiation-Hardened Electronic Material Revenue Market Share by Application (2021-2026)

Table 30. Global Radiation-Hardened Electronic Material Sale Price by Application (2021-2026) & (US\$/kg)

Table 31. Global Radiation-Hardened Electronic Material Sales by Company (2021-2026) & (Kilotons)

Table 32. Global Radiation-Hardened Electronic Material Sales Market Share by Company (2021-2026)

Table 33. Global Radiation-Hardened Electronic Material Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Radiation-Hardened Electronic Material Revenue Market Share by Company (2021-2026)

Table 35. Global Radiation-Hardened Electronic Material Sale Price by Company (2021-2026) & (US\$/kg)

Table 36. Key Manufacturers Radiation-Hardened Electronic Material Producing Area Distribution and Sales Area

Table 37. Players Radiation-Hardened Electronic Material Products Offered

Table 38. Radiation-Hardened Electronic Material Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Radiation-Hardened Electronic Material Sales by Geographic Region (2021-2026) & (Kilotons)

Table 42. Global Radiation-Hardened Electronic Material Sales Market Share Geographic Region (2021-2026)

Table 43. Global Radiation-Hardened Electronic Material Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Radiation-Hardened Electronic Material Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Radiation-Hardened Electronic Material Sales by Country/Region (2021-2026) & (Kilotons)

Table 46. Global Radiation-Hardened Electronic Material Sales Market Share by Country/Region (2021-2026)

Table 47. Global Radiation-Hardened Electronic Material Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Radiation-Hardened Electronic Material Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas Radiation-Hardened Electronic Material Sales by Country (2021-2026) & (Kilotons)

Table 50. Americas Radiation-Hardened Electronic Material Sales Market Share by Country (2021-2026)

Table 51. Americas Radiation-Hardened Electronic Material Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas Radiation-Hardened Electronic Material Sales by Type (2021-2026) & (Kilotons)

Table 53. Americas Radiation-Hardened Electronic Material Sales by Application (2021-2026) & (Kilotons)

Table 54. APAC Radiation-Hardened Electronic Material Sales by Region (2021-2026) & (Kilotons)

Table 55. APAC Radiation-Hardened Electronic Material Sales Market Share by Region (2021-2026)

Table 56. APAC Radiation-Hardened Electronic Material Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Radiation-Hardened Electronic Material Sales by Type (2021-2026) & (Kilotons)

Table 58. APAC Radiation-Hardened Electronic Material Sales by Application (2021-2026) & (Kilotons)

Table 59. Europe Radiation-Hardened Electronic Material Sales by Country (2021-2026) & (Kilotons)

Table 60. Europe Radiation-Hardened Electronic Material Revenue by Country (2021-2026) & (\$ millions)

Table 61. Europe Radiation-Hardened Electronic Material Sales by Type (2021-2026) & (Kilotons)

Table 62. Europe Radiation-Hardened Electronic Material Sales by Application (2021-2026) & (Kilotons)

Table 63. Middle East & Africa Radiation-Hardened Electronic Material Sales by Country (2021-2026) & (Kilotons)

Table 64. Middle East & Africa Radiation-Hardened Electronic Material Revenue Market Share by Country (2021-2026)

Table 65. Middle East & Africa Radiation-Hardened Electronic Material Sales by Type

(2021-2026) & (Kilotons)

Table 66. Middle East & Africa Radiation-Hardened Electronic Material Sales by Application (2021-2026) & (Kilotons)

Table 67. Key Market Drivers & Growth Opportunities of Radiation-Hardened Electronic Material

Table 68. Key Market Challenges & Risks of Radiation-Hardened Electronic Material

Table 69. Key Industry Trends of Radiation-Hardened Electronic Material

Table 70. Radiation-Hardened Electronic Material Raw Material

Table 71. Key Suppliers of Raw Materials

Table 72. Radiation-Hardened Electronic Material Distributors List

Table 73. Radiation-Hardened Electronic Material Customer List

Table 74. Global Radiation-Hardened Electronic Material Sales Forecast by Region (2027-2032) & (Kilotons)

Table 75. Global Radiation-Hardened Electronic Material Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 76. Americas Radiation-Hardened Electronic Material Sales Forecast by Country (2027-2032) & (Kilotons)

Table 77. Americas Radiation-Hardened Electronic Material Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. APAC Radiation-Hardened Electronic Material Sales Forecast by Region (2027-2032) & (Kilotons)

Table 79. APAC Radiation-Hardened Electronic Material Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Europe Radiation-Hardened Electronic Material Sales Forecast by Country (2027-2032) & (Kilotons)

Table 81. Europe Radiation-Hardened Electronic Material Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Middle East & Africa Radiation-Hardened Electronic Material Sales Forecast by Country (2027-2032) & (Kilotons)

Table 83. Middle East & Africa Radiation-Hardened Electronic Material Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Global Radiation-Hardened Electronic Material Sales Forecast by Type (2027-2032) & (Kilotons)

Table 85. Global Radiation-Hardened Electronic Material Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Radiation-Hardened Electronic Material Sales Forecast by Application (2027-2032) & (Kilotons)

Table 87. Global Radiation-Hardened Electronic Material Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. Soitec Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 89. Soitec Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 90. Soitec Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 91. Soitec Main Business
Table 92. Soitec Latest Developments
Table 93. GlobalWafers Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 94. GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 95. GlobalWafers Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 96. GlobalWafers Co., Ltd. Main Business
Table 97. GlobalWafers Co., Ltd. Latest Developments
Table 98. SUMCO Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 99. SUMCO Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 100. SUMCO Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 101. SUMCO Corporation Main Business
Table 102. SUMCO Corporation Latest Developments
Table 103. Okmetic Oy Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 104. Okmetic Oy Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 105. Okmetic Oy Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 106. Okmetic Oy Main Business
Table 107. Okmetic Oy Latest Developments
Table 108. Shanghai Simgui Technology Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 109. Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 110. Shanghai Simgui Technology Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 111. Shanghai Simgui Technology Co., Ltd. Main Business
Table 112. Shanghai Simgui Technology Co., Ltd. Latest Developments
Table 113. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 114. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 115. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 116. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Main Business
Table 117. Zhonghuan Advanced Semiconductor Materials Co., Ltd. Latest Developments
Table 118. Wolfspeed, Inc. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 119. Wolfspeed, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 120. Wolfspeed, Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 121. Wolfspeed, Inc. Main Business
Table 122. Wolfspeed, Inc. Latest Developments
Table 123. Coherent Corp. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 124. Coherent Corp. Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 125. Coherent Corp. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 126. Coherent Corp. Main Business
Table 127. Coherent Corp. Latest Developments
Table 128. SK siltron css Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 129. SK siltron css Radiation-Hardened Electronic Material Product Portfolios and Specifications
Table 130. SK siltron css Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)
Table 131. SK siltron css Main Business
Table 132. SK siltron css Latest Developments
Table 133. onsemi Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 134. onsemi Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 135. onsemi Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 136. onsemi Main Business

Table 137. onsemi Latest Developments

Table 138. SICC Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 139. SICC Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 140. SICC Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 141. SICC Co., Ltd. Main Business

Table 142. SICC Co., Ltd. Latest Developments

Table 143. Tankeblue Semiconductor Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 144. Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 145. Tankeblue Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 146. Tankeblue Semiconductor Co., Ltd. Main Business

Table 147. Tankeblue Semiconductor Co., Ltd. Latest Developments

Table 148. Sanan Semiconductor Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 149. Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 150. Sanan Semiconductor Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 151. Sanan Semiconductor Co., Ltd. Main Business

Table 152. Sanan Semiconductor Co., Ltd. Latest Developments

Table 153. AXT, Inc. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 154. AXT, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 155. AXT, Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 156. AXT, Inc. Main Business

Table 157. AXT, Inc. Latest Developments

Table 158. Freiburger Compound Materials GmbH Basic Information, Radiation-

Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 159. Freiburger Compound Materials GmbH Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 160. Freiburger Compound Materials GmbH Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 161. Freiburger Compound Materials GmbH Main Business

Table 162. Freiburger Compound Materials GmbH Latest Developments

Table 163. Sumitomo Electric Industries, Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 164. Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 165. Sumitomo Electric Industries, Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 166. Sumitomo Electric Industries, Ltd. Main Business

Table 167. Sumitomo Electric Industries, Ltd. Latest Developments

Table 168. IQE plc Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 169. IQE plc Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 170. IQE plc Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 171. IQE plc Main Business

Table 172. IQE plc Latest Developments

Table 173. Qnity Electronics, Inc. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 174. Qnity Electronics, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 175. Qnity Electronics, Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 176. Qnity Electronics, Inc. Main Business

Table 177. Qnity Electronics, Inc. Latest Developments

Table 178. UBE Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 179. UBE Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 180. UBE Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 181. UBE Corporation Main Business

Table 182. UBE Corporation Latest Developments

Table 183. Kaneka Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 184. Kaneka Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 185. Kaneka Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 186. Kaneka Corporation Main Business

Table 187. Kaneka Corporation Latest Developments

Table 188. PI Advanced Materials Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 189. PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 190. PI Advanced Materials Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 191. PI Advanced Materials Co., Ltd. Main Business

Table 192. PI Advanced Materials Co., Ltd. Latest Developments

Table 193. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 194. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 195. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 196. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Main Business

Table 197. Shenzhen Rayitek Hi-Tech Film Co., Ltd. Latest Developments

Table 198. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 199. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 200. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 201. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Main Business

Table 202. Zhuzhou Times Huaxin New Material Technology Co., Ltd. Latest Developments

Table 203. Arlon Electronic Materials Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 204. Arlon Electronic Materials Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 205. Arlon Electronic Materials Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 206. Arlon Electronic Materials Main Business

Table 207. Arlon Electronic Materials Latest Developments

Table 208. Rogers Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 209. Rogers Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 210. Rogers Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 211. Rogers Corporation Main Business

Table 212. Rogers Corporation Latest Developments

Table 213. Isola Group Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 214. Isola Group Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 215. Isola Group Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 216. Isola Group Main Business

Table 217. Isola Group Latest Developments

Table 218. Panasonic Holdings Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 219. Panasonic Holdings Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 220. Panasonic Holdings Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 221. Panasonic Holdings Corporation Main Business

Table 222. Panasonic Holdings Corporation Latest Developments

Table 223. Dow Inc. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 224. Dow Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 225. Dow Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 226. Dow Inc. Main Business

Table 227. Dow Inc. Latest Developments

Table 228. Momentive Performance Materials Inc. Basic Information, Radiation-

Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors
Table 229. Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 230. Momentive Performance Materials Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 231. Momentive Performance Materials Inc. Main Business

Table 232. Momentive Performance Materials Inc. Latest Developments

Table 233. Avantor, Inc. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 234. Avantor, Inc. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 235. Avantor, Inc. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 236. Avantor, Inc. Main Business

Table 237. Avantor, Inc. Latest Developments

Table 238. Wacker Chemie AG Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 239. Wacker Chemie AG Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 240. Wacker Chemie AG Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 241. Wacker Chemie AG Main Business

Table 242. Wacker Chemie AG Latest Developments

Table 243. Henkel AG & Co. KGaA Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 244. Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 245. Henkel AG & Co. KGaA Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 246. Henkel AG & Co. KGaA Main Business

Table 247. Henkel AG & Co. KGaA Latest Developments

Table 248. Shin-Etsu Chemical Co., Ltd. Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 249. Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 250. Shin-Etsu Chemical Co., Ltd. Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 251. Shin-Etsu Chemical Co., Ltd. Main Business

Table 252. Shin-Etsu Chemical Co., Ltd. Latest Developments

Table 253. 3M Company Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 254. 3M Company Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 255. 3M Company Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 256. 3M Company Main Business

Table 257. 3M Company Latest Developments

Table 258. Parker Hannifin Corporation Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 259. Parker Hannifin Corporation Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 260. Parker Hannifin Corporation Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 261. Parker Hannifin Corporation Main Business

Table 262. Parker Hannifin Corporation Latest Developments

Table 263. Laird Performance Materials Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 264. Laird Performance Materials Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 265. Laird Performance Materials Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 266. Laird Performance Materials Main Business

Table 267. Laird Performance Materials Latest Developments

Table 268. Heraeus Holding GmbH Basic Information, Radiation-Hardened Electronic Material Manufacturing Base, Sales Area and Its Competitors

Table 269. Heraeus Holding GmbH Radiation-Hardened Electronic Material Product Portfolios and Specifications

Table 270. Heraeus Holding GmbH Radiation-Hardened Electronic Material Sales (Kilotons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 271. Heraeus Holding GmbH Main Business

Table 272. Heraeus Holding GmbH Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Radiation-Hardened Electronic Material
- Figure 2. Radiation-Hardened Electronic Material Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Radiation-Hardened Electronic Material Sales Growth Rate 2021-2032 (Kilotons)
- Figure 7. Global Radiation-Hardened Electronic Material Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Radiation-Hardened Electronic Material Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Radiation-Hardened Electronic Material Sales Market Share by Country/Region (2025)
- Figure 10. Radiation-Hardened Electronic Material Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Wafers and Substrates
- Figure 12. Product Picture of Epitaxial Wafers
- Figure 13. Product Picture of Films
- Figure 14. Product Picture of Laminates and Copper-clad Laminates
- Figure 15. Product Picture of Adhesives and Encapsulants
- Figure 16. Product Picture of Conformal Coatings
- Figure 17. Product Picture of Others
- Figure 18. Global Radiation-Hardened Electronic Material Sales Market Share by Type in 2026
- Figure 19. Global Radiation-Hardened Electronic Material Revenue Market Share by Type (2021-2026)
- Figure 20. Product Picture of Total Ionizing Dose Resistant
- Figure 21. Product Picture of Single Event Effect Mitigation
- Figure 22. Product Picture of Displacement Damage Resistant
- Figure 23. Product Picture of Low Outgassing Space-grade Materials
- Figure 24. Product Picture of Environmental Reliability Support Materials
- Figure 25. Product Picture of Others
- Figure 26. Global Radiation-Hardened Electronic Material Sales Market Share by Radiation Reliability Requirement in 2026
- Figure 27. Global Radiation-Hardened Electronic Material Revenue Market Share by

Radiation Reliability Requirement (2021-2026)

Figure 28. Radiation-Hardened Electronic Material Consumed in Satellite Platform Electronics

Figure 29. Global Radiation-Hardened Electronic Material Market: Satellite Platform Electronics (2021-2026) & (Kilotons)

Figure 30. Radiation-Hardened Electronic Material Consumed in Space Payload Electronics

Figure 31. Global Radiation-Hardened Electronic Material Market: Space Payload Electronics (2021-2026) & (Kilotons)

Figure 32. Radiation-Hardened Electronic Material Consumed in Deep Space and Space Science Systems

Figure 33. Global Radiation-Hardened Electronic Material Market: Deep Space and Space Science Systems (2021-2026) & (Kilotons)

Figure 34. Radiation-Hardened Electronic Material Consumed in Nuclear Industry Electronics

Figure 35. Global Radiation-Hardened Electronic Material Market: Nuclear Industry Electronics (2021-2026) & (Kilotons)

Figure 36. Radiation-Hardened Electronic Material Consumed in Particle Detection and Research Electronics

Figure 37. Global Radiation-Hardened Electronic Material Market: Particle Detection and Research Electronics (2021-2026) & (Kilotons)

Figure 38. Radiation-Hardened Electronic Material Consumed in Defense and Strategic Electronics

Figure 39. Global Radiation-Hardened Electronic Material Market: Defense and Strategic Electronics (2021-2026) & (Kilotons)

Figure 40. Radiation-Hardened Electronic Material Consumed in Aerospace Avionics

Figure 41. Global Radiation-Hardened Electronic Material Market: Aerospace Avionics (2021-2026) & (Kilotons)

Figure 42. Radiation-Hardened Electronic Material Consumed in Others

Figure 43. Global Radiation-Hardened Electronic Material Market: Others (2021-2026) & (Kilotons)

Figure 44. Global Radiation-Hardened Electronic Material Sale Market Share by Application (2025)

Figure 45. Global Radiation-Hardened Electronic Material Revenue Market Share by Application in 2025

Figure 46. Radiation-Hardened Electronic Material Sales by Company in 2025 (Kilotons)

Figure 47. Global Radiation-Hardened Electronic Material Sales Market Share by Company in 2025

Figure 48. Radiation-Hardened Electronic Material Revenue by Company in 2025 (\$

millions)

Figure 49. Global Radiation-Hardened Electronic Material Revenue Market Share by Company in 2025

Figure 50. Global Radiation-Hardened Electronic Material Sales Market Share by Geographic Region (2021-2026)

Figure 51. Global Radiation-Hardened Electronic Material Revenue Market Share by Geographic Region in 2025

Figure 52. Americas Radiation-Hardened Electronic Material Sales 2021-2026 (Kilotons)

Figure 53. Americas Radiation-Hardened Electronic Material Revenue 2021-2026 (\$ millions)

Figure 54. APAC Radiation-Hardened Electronic Material Sales 2021-2026 (Kilotons)

Figure 55. APAC Radiation-Hardened Electronic Material Revenue 2021-2026 (\$ millions)

Figure 56. Europe Radiation-Hardened Electronic Material Sales 2021-2026 (Kilotons)

Figure 57. Europe Radiation-Hardened Electronic Material Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Radiation-Hardened Electronic Material Sales 2021-2026 (Kilotons)

Figure 59. Middle East & Africa Radiation-Hardened Electronic Material Revenue 2021-2026 (\$ millions)

Figure 60. Americas Radiation-Hardened Electronic Material Sales Market Share by Country in 2025

Figure 61. Americas Radiation-Hardened Electronic Material Revenue Market Share by Country (2021-2026)

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