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Global Semiconductor Grade Etching Gas Market Growth 2026-2032

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Abstracts

The global Semiconductor Grade Etching Gas market size is predicted to grow from US$ 1073 million in 2025 to US$ 1814 million in 2032; it is expected to grow at a CAGR of 7.9% from 2026 to 2032.

Semiconductor-grade etching gas refers to the general term for high-purity process gases specifically used for etching and cavity cleaning during the processing of integrated circuit wafers, flat panel displays, photovoltaics, and various types of microelectronic devices, including fluorine-containing, chlorine-containing, bromine-containing and mixed formula gases, etc.; Under plasma or high-energy excitation conditions, this type of gas decomposes to produce highly reactive atoms and free radicals, which chemically react or react with materials such as silicon, silicon dioxide, silicon nitride, low dielectric constant media, metals and their oxides. Physical and chemical synergy generates volatile products to achieve pattern transfer and material removal. Compared with industrial-grade products, semiconductor-grade etching gases have extremely strict requirements on metal impurities, moisture, organic impurities and particulate matter. They require multi-stage distillation, adsorption, filtration and online analysis and control, and are equipped with ultra-clean cylinders and high-purity gas supply systems to ensure the stability of etching rate, selectivity, anisotropy and line width control, and meet the yield and consistency requirements of advanced processes.In 2024, global Semiconductor Grade Etching Gas production reached approximately 37,907 MT, with an average global market price of around US$ 26.33 per kg.The annual production capacity of semiconductor-grade etching gas is 55,000 tons, with a gross profit margin of about 40%. The key upstream raw materials are fluorspar, anhydrous hydrogen fluoride, fluorine gas, and carbon-containing raw materials such as methane, ethane, and propane. It is also equipped with high-pressure alloy cylinders, stainless steel valves, pressure reducing valves, ultra-clean pipelines,

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etc. The downstream is mainly integrated circuit wafer factories, flat panel display panel factories, and photovoltaic cell factories. From a cost structure perspective, raw gases and basic chemicals usually account for 35% to 50% of the total cost, energy consumption, adsorbents, packing and equipment depreciation in the high-purity refining process account for about 20% to 30%, and high-pressure cylinders, valves, pipeline cleaning, cylinder testing and depreciation roughly account for 10% to 20%.

Electronics manufacturing uses both wet and dry etching, but for different processes, much like using course- and fine-toothed saws to make different size and different quality cuts. In wet etching, aqueous solutions of acids or bases are used to quickly remove large amounts of material, or to completely remove a particular material. Dry etching uses plasma-activated etchant gases, usually containing halogen atoms, to selectively remove a portion of a material with greater precision and accuracy than wet etching can achieve. It is the dry etching process, often referred to as reactive ion etching or RIE. The etching process requires a chemical reaction between the electron gas and the etched material. In the etching process of wafer manufacturing, especially in the dry etching process, in order to achieve directional etching, it is necessary to use electronic special gases to form plasma under ionization conditions. The plasma undergoes chemical or physical reactions with the etched material to remove a portion of the etched material. Different electron gases are also used for reactions in different etching targets. The commonly used etching gases include fluorinated and chlorinated gases, as well as oxygen-containing gases and some rare gases.

In the field of electronic semiconductors, etching gases are widely used in industries such as integrated Circuits, liquid crystal panels, LED and photovoltaics. Among them, integrated circuit manufacturing is the most important application. In recent years, downstream industry technologies have rapidly changed, especially in the field of integrated circuit manufacturing, where process nodes have been continuously reduced, ranging from 28nm to 5nm processes, and wafer sizes from 8-inch to 12-inch wafers. As a key material in integrated circuit manufacturing, with the rapid iteration of downstream industrial technology, the requirements for purity and accuracy of special gases continue to improve. Asia Pacific is the region with the largest demand for semiconductor grade etching gases. Etching gases mainly include fluorine containing gas, chlorine containing gas, oxygen containing gas and other types. And the fluorine containing gas is the most common. Fluorinated containing gas include the following gases: CF4, NF3, SF6, CH2F2, CHF3, C2F6, C3F8, C4F8, C5F8, HF, etc. Silicon wafer etching gases are mainly fluorine-containing gases, but they are isotropic and have poor selectivity.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Semiconductor Grade Etching Gas 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 Semiconductor Grade Etching Gas.

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

Segmentation by Type:

Fluorine Containing Gas

Chlorine Containing Gas

Oxygen Containing Gas

Others

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Segmentation by Purity:

Purity?4N

Purity?5N

Purity?6N

Segmentation by Etching Characteristics:

Wet Etching Gas

Dry Etching Gas

Segmentation by Application:

Integrated Circuits

Display Panels

Solar

LED

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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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.

Linde

SK Specialty

Kanto Denka Kogyo

ADEKA

PERIC Special Gases

Merck (Versum Materials)

Resonac

Nippon Sanso

Hyosung

Air Liquide

Haohua Chemical

Zibo Feiyuan Chemical

Kemeite (Yoke Technology)

Solvay

Huate Gas

Yongjing Technology

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Air Products

Jinhong Gas

Concorde Specialty Gases

Linggas

Foosung

Wonik Materials

DIG AIRGAS

TEMC

Key Questions Addressed in this Report

What is the 10-year outlook for the global Semiconductor Grade Etching Gas market?

What factors are driving Semiconductor Grade Etching Gas market growth, globally and by region?

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

How do Semiconductor Grade Etching Gas market opportunities vary by end market size?

How does Semiconductor Grade Etching Gas break out by Type, by Application?

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