

Electronic Wet Chemicals Market by Type (Acetic Acid, Isopropyl Alcohol, Phosphoric Acid) Form (Liquid Form, Solid Form, Gas Form) Application (Semiconductor, IC Packaging, PCB), End-use Industry, And Region - Global Forecast to 2028

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Abstracts

The Electronic wet chemicals Market is projected to reach USD 5.4 billion by 2028, at a CAGR of 7.2% from USD 3.8 billion in 2023. The global electronic wet chemicals market is experiencing rapid growth due to several key factors. One of the main drivers of growth is the increasing demand for hydrogen peroxide from the semiconductor industry. Electronic wet chemicals are crucial in the semiconductor industry, playing a vital role in the fabrication of integrated circuits and semiconductor devices. These chemicals are utilized in precision processes such as photolithography, etching, deposition, and cleaning. They enable the creation of intricate circuit patterns, precise layering of materials on semiconductor wafers, and the removal of unwanted materials. The semiconductor industry's continuous drive for miniaturization, technological advancements, and the demand for high-performance electronic devices further emphasizes the significance of electronic wet chemicals in ensuring the quality, reliability, and functionality of semiconductor components. Another factor driving the growth of the electronic wet chemicals market is the advancements in the electronics industry, characterized by innovations in semiconductor technology, IoT applications, and high-performance devices, are driving the demand for electronic wet chemicals. As electronic components become smaller, more complex, and technologically advanced, precise fabrication processes are essential. Electronic wet chemicals play a pivotal role in critical manufacturing steps such as photolithography, etching, and deposition. The increasing need for high-purity chemicals, compatibility with advanced materials, and adherence to stringent environmental and safety standards underscores the integral role of electronic wet chemicals in meeting the evolving demands of the dynamic and

rapidly advancing electronics industry.

“Gas, by form, accounts for the second-largest market share in 2022.”

Gas holds the second-largest share in electronic wet chemicals, mainly due to its pivotal role in semiconductor manufacturing processes. Gaseous chemicals, utilized in deposition techniques like Chemical Vapor Deposition (CVD) and Atomic Layer Deposition (ALD), offer precision in layering materials on semiconductor wafers. They excel in achieving uniform coatings on complex structures, enable selective deposition and etching, and contribute to advanced process control. Additionally, gaseous forms minimize material waste, exhibit compatibility with advanced materials, ensure cleanliness in cleanroom environments, allow precise temperature and pressure control, and offer scalability for high-volume semiconductor manufacturing, making them indispensable for the industry's evolving needs.

“Semiconductor is expected to be the fastest growing at CAGR 7.4% for electronic wet chemicals market during the forecast period, in terms of value.”

The semiconductor industry is experiencing unparalleled growth within the electronic wet chemicals market, propelled by several key factors. At the forefront are continuous technological advancements and the relentless pursuit of miniaturization, driving semiconductor fabrication processes to demand increasingly sophisticated electronic wet chemicals for precision in component design and production. The evolution toward advanced node technologies, such as 7nm, 5nm, and below, amplifies the need for high-performance chemicals in critical processes like photolithography, etching, and deposition. With the global surge in demand for electronic devices, semiconductor manufacturing capacity has expanded significantly, correlating directly with an increased need for electronic wet chemicals. The stringent requirements for high-purity chemicals in semiconductor manufacturing, essential for maintaining performance and reliability, contribute to the surging demand. As semiconductor components become more intricate with complex circuitry and multiple layers, electronic wet chemicals play an indispensable role in achieving desired complexity and functionality. The global adoption of advanced semiconductor technologies, coupled with the emergence of new materials and the integration of IoT and AI technologies, fuels the demand for electronic wet chemicals on an international scale.

“Based on region, Europe was the second largest market for electronic wet chemicals market in 2022.”

Europe secures its position as the second-largest region in the electronic wet chemicals market, primarily propelled by a robust and advanced manufacturing base concentrated in nations like Germany, the United Kingdom, and the Netherlands. The region's strength in semiconductor manufacturing, housing well-established companies and research institutions, fuels a substantial demand for electronic wet chemicals, crucial in processes ranging from photolithography to etching and cleaning. Europe's unwavering commitment to research and innovation ensures the continual development of cutting-edge technologies and materials, influencing the formulation of advanced electronic wet chemical solutions that cater to the dynamic needs of electronic manufacturing. Renowned for enforcing stringent environmental and safety standards, European countries foster the adoption of cleaner and more sustainable practices in the electronic industry, influencing the choice and formulation of electronic wet chemicals. The automotive and aerospace industries, flourishing in Europe, extensively rely on electronic components, incorporating these chemicals into processes involving PCBs, sensors, and electronic systems. Furthermore, Europe's emphasis on renewable energy technologies, global export prominence in electronic goods, and a collaborative environment through partnerships and initiatives contribute synergistically to sustaining the region's significant role in the electronic wet chemicals market.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

By Company Type: Tier 1 - 40%, Tier 2 - 30%, and Tier 3 - 30%

By Designation: C-Level - 20%, Director Level - 10%, and Others - 70%

By Region: North America - 20%, Europe -30%, Asia Pacific - 30%, Middle East & Africa - 10%, and South America-10%

The key players in this market are Avantor Inc. (US), BASF SE (Germany), Cabot Microelectronics (US), and Kanto Chemical Co. Inc. (Japan), Honeywell International, Inc. (US), Eastman Chemical Company (US), Linde Plc (Ireland), Solvay (Belgium), Fujifilm Corporation (Japan), and Technic Inc. (US) etc.

Research Coverage

This report segments the market for the electronic wet chemicals market on the basis of

type, application, form, end-use industry and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisitions associated with the market for the electronic wet chemicals market.

Key benefits of buying this report

This research report is focused on various levels of analysis — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the electronic wet chemicals market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers: Technological advancements in the electronics industry coupled with rise in demand for hydrogen peroxide in the semiconductor industry.

Market Penetration: Comprehensive information on the electronic wet chemicals market offered by top players in the global electronic wet chemicals market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the electronic wet chemicals market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for the electronic wet chemicals market across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global electronic wet chemicals market.

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the electronic wet chemicals market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS & EXCLUSIONS

1.4 MARKET SCOPE

FIGURE 1 ELECTRONIC WET CHEMICALS MARKET SEGMENTATION

1.4.1 REGIONS COVERED

1.4.2 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 UNITS CONSIDERED

1.7 LIMITATIONS

1.8 STAKEHOLDERS

1.9 IMPACT OF RECESSION

1.10 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 ELECTRONIC WET CHEMICALS MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.2 PRIMARY DATA

2.1.2.1 Primary interviews - Top electronic wet chemical manufacturers

2.1.2.2 Breakdown of primary interviews

2.1.2.3 Key industry insights

2.2 BASE NUMBER CALCULATION

2.2.1 SUPPLY-SIDE APPROACH

2.2.2 DEMAND-SIDE APPROACH

2.3 FORECAST NUMBER CALCULATION

2.3.1 SUPPLY SIDE

2.3.2 DEMAND SIDE

2.4 MARKET SIZE ESTIMATION

2.4.1 BOTTOM-UP APPROACH

2.4.2 TOP-DOWN APPROACH

2.5 DATA TRIANGULATION

FIGURE 3 ELECTRONIC WET CHEMICALS MARKET: DATA TRIANGULATION

2.6 RESEARCH ASSUMPTIONS

3 EXECUTIVE SUMMARY

FIGURE 4 SEMICONDUCTOR APPLICATION TO DOMINATE ELECTRONIC WET CHEMICALS MARKET BETWEEN 2023 AND 2028

FIGURE 5 ACETIC ACID SEGMENT TO LEAD ELECTRONIC WET CHEMICALS MARKET BETWEEN 2023 AND 2030

FIGURE 6 LIQUID FORM SEGMENT TO DOMINATE ELECTRONIC WET CHEMICALS MARKET DURING FORECAST PERIOD

FIGURE 7 CONSUMER GOODS SEGMENT TO LEAD ELECTRONIC WET CHEMICALS MARKET DURING FORECAST PERIOD

FIGURE 8 ASIA PACIFIC ESTIMATED TO DOMINATE ELECTRONIC WET CHEMICALS MARKET IN 2023

4 PREMIUM INSIGHTS

4.1 SIGNIFICANT OPPORTUNITIES FOR PLAYERS IN ELECTRONIC WET CHEMICALS MARKET

FIGURE 9 EXPANSION OF SEMICONDUCTOR INDUSTRY COUPLED WITH GROWTH OF CONSUMER GOODS SECTOR TO DRIVE MARKET

4.2 ELECTRONIC WET CHEMICALS MARKET, BY TYPE

FIGURE 10 SULFURIC ACID FASTEST-GROWING TYPE SEGMENT DURING FORECAST PERIOD

4.3 ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION

FIGURE 11 SEMICONDUCTOR FASTEST-GROWING APPLICATION SEGMENT DURING FORECAST PERIOD

4.4 ELECTRONIC WET CHEMICALS MARKET, BY FORM

FIGURE 12 LIQUID FORM FASTEST-GROWING SEGMENT DURING FORECAST PERIOD

4.5 ELECTRONIC WET CHEMICALS MARKET, BY REGION

FIGURE 13 ASIA PACIFIC TO BE FASTEST-GROWING REGION IN ELECTRONIC WET CHEMICALS MARKET DURING FORECAST PERIOD

4.6 ELECTRONIC WET CHEMICALS MARKET, BY KEY COUNTRY

FIGURE 14 INDIA TO BE FASTEST-GROWING MARKET FOR ELECTRONIC WET CHEMICALS DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 15 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN ELECTRONIC WET CHEMICALS MARKET

5.2.1 DRIVERS

- 5.2.1.1 Technological advancements in electronics industry
- 5.2.1.2 Increasing use of semiconductors and integrated chips
- 5.2.1.3 Rise in demand for hydrogen peroxide from semiconductor industry

5.2.2 RESTRAINTS

- 5.2.2.1 Stringent health and environmental regulations for certain chemicals

5.2.3 OPPORTUNITIES

- 5.2.3.1 Improved IT infrastructure and upcoming technologies
- 5.2.3.2 Increasing demand for consumer goods

5.2.4 CHALLENGES

- 5.2.4.1 Rapid decline in use of certain technologies due to introduction of cloud-based storage

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

6.2.1 REVENUE SHIFT AND NEW REVENUE POCKETS FOR ELECTRONIC WET CHEMICAL MANUFACTURERS

FIGURE 16 REVENUE SHIFT OF ELECTRONIC WET CHEMICALS MARKET

6.3 VALUE CHAIN ANALYSIS

FIGURE 17 OVERVIEW OF ELECTRONIC WET CHEMICALS MARKET VALUE CHAIN

- 6.3.1 RAW MATERIAL SOURCING
- 6.3.2 RESEARCH & DEVELOPMENT
- 6.3.3 APPLICATORS/FORMLATORS
- 6.3.4 END-USE INDUSTRIES

6.4 PRICING ANALYSIS

- 6.4.1 AVERAGE SELLING PRICE TREND, BY REGION

TABLE 1 AVERAGE SELLING PRICE, BY REGION, 2019–2028 (USD/TON)

FIGURE 18 ELECTRONIC WET CHEMICALS MARKET: AVERAGE SELLING PRICE TREND, BY REGION

- 6.4.2 AVERAGE SELLING PRICE TREND, BY TYPE

TABLE 2 AVERAGE SELLING PRICE, BY TYPE, 2019–2028 (USD/TON)

- 6.4.3 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY TOP 3 TYPES

TABLE 3 AVERAGE SELLING PRICE OF TOP 3 TYPES, BY KEY PLAYER,

2019–2028 (USD/TON)

FIGURE 19 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY TOP 3 TYPES

6.4.4 AVERAGE SELLING PRICE TREND, BY FORM

TABLE 4 AVERAGE SELLING PRICE, BY FORM, 2019–2028 (USD/TON)

6.4.5 AVERAGE SELLING PRICE TREND, BY APPLICATION

TABLE 5 AVERAGE SELLING PRICE, BY APPLICATION, 2019–2028 (USD/TON)

6.5 ECOSYSTEM MAP

TABLE 6 ELECTRONIC WET CHEMICALS MARKET: ECOSYSTEM

6.6 TECHNOLOGY ANALYSIS

TABLE 7 TECHNOLOGIES OFFERED IN ELECTRONIC WET CHEMICALS MARKET

6.7 PATENT ANALYSIS

6.7.1 METHODOLOGY

6.7.2 PATENTS GRANTED WORLDWIDE, 2013–2022

TABLE 8 TOTAL NUMBER OF PATENTS

6.7.2.1 Publication trends over last ten years

FIGURE 20 NUMBER OF PATENTS GRANTED OVER LAST 10 YEARS

6.7.3 INSIGHTS

6.7.4 LEGAL STATUS OF PATENTS

FIGURE 21 PATENT ANALYSIS, BY LEGAL STATUS

6.7.5 JURISDICTION ANALYSIS

FIGURE 22 REGIONAL ANALYSIS OF PATENTS GRANTED FOR ELECTRONIC WET CHEMICALS MARKET, 2023

6.7.6 TOP COMPANIES/APPLICANTS

FIGURE 23 TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENTS IN LAST TEN YEARS

TABLE 9 LIST OF MAJOR PATENT OWNERS FOR ELECTRONIC WET CHEMICALS

6.7.7 LIST OF MAJOR PATENTS

TABLE 10 MAJOR PATENTS FOR ELECTRONIC WET CHEMICALS

6.8 TRADE ANALYSIS

6.8.1 IMPORT SCENARIO

FIGURE 24 IMPORTS OF ELECTRONIC WET CHEMICALS, BY COUNTRY, 2019–2022 (USD MILLION)

6.8.2 EXPORT SCENARIO

FIGURE 25 EXPORTS OF ELECTRONIC WET CHEMICALS, BY COUNTRY, 2019–2022 (USD MILLION)

6.9 KEY CONFERENCES & EVENTS, 2023–2024

TABLE 11 ELECTRONIC WET CHEMICALS MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

6.10 TARIFF AND REGULATORY LANDSCAPE

6.10.1 TARIFF AND REGULATIONS RELATED TO ELECTRONIC WET CHEMICALS

TABLE 12 TARIFFS RELATED TO ELECTRONIC WET CHEMICALS MARKET

6.10.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 SOUTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.10.3 REGULATIONS RELATED TO ELECTRONIC WET CHEMICALS MARKET

TABLE 18 LIST OF REGULATIONS FOR ELECTRONIC WET CHEMICALS MARKET

6.11 PORTER'S FIVE FORCES ANALYSIS

TABLE 19 IMPACT OF PORTER'S FIVE FORCES ON ELECTRONIC WET CHEMICALS MARKET

FIGURE 26 PORTER'S FIVE FORCES ANALYSIS: ELECTRONIC WET CHEMICALS MARKET

6.11.1 THREAT OF NEW ENTRANTS

6.11.2 THREATS OF SUBSTITUTES

6.11.3 BARGAINING POWER OF SUPPLIERS

6.11.4 BARGAINING POWER OF BUYERS

6.11.5 INTENSITY OF COMPETITIVE RIVALRY

6.12 KEY STAKEHOLDERS AND BUYING CRITERIA

6.12.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 27 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS

TABLE 20 INFLUENCE OF INSTITUTIONAL BUYERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS

6.12.2 BUYING CRITERIA

FIGURE 28 KEY BUYING CRITERIA FOR APPLICATIONS

TABLE 21 KEY BUYING CRITERIA FOR APPLICATIONS

6.13 MACROECONOMIC INDICATORS

6.13.1 GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES

6.14 CASE STUDIES

6.14.1 WASTE GENERATION AND MANAGEMENT IN SEMICONDUCTOR INDUSTRY

6.14.2 OCCEAN INSIGHT COLLABORATED WITH PROMINENT PIONEER IN PLASMA-ETCHING TECHNOLOGIES TO INVESTIGATE COMPREHENSIVE SPECTRUM PLASMA MONITORING SOLUTIONS TAILORED FOR IDENTIFICATION OF CRUCIAL WAFER ETCH ENDPOINTS

6.14.3 STRATEGIC INITIATIVE BY INTEL CORPORATION TO MINIMIZE ENVIRONMENTAL IMPACT OF PCB MANUFACTURING

7 ELECTRONIC WET CHEMICALS MARKET, BY FORM

7.1 INTRODUCTION

FIGURE 29 LIQUID FORM SEGMENT TO DOMINATE ELECTRONIC WET CHEMICALS MARKET DURING FORECAST PERIOD

TABLE 23 ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 24 ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 25 ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (KILOTON)

TABLE 26 ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

7.2 LIQUID FORM

7.2.1 ASIA PACIFIC TO BE LARGEST MARKET FOR LIQUID FORM WET CHEMICALS

7.3 GAS FORM

7.3.1 INCREASING DEMAND FROM SEMICONDUCTORS INDUSTRY TO DRIVE GROWTH

7.4 SOLID FORM

7.4.1 CLEANING AND ETCHING OF SEMICONDUCTORS TO DRIVE DEMAND

8 ELECTRONIC WET CHEMICALS MARKET, BY TYPE

8.1 INTRODUCTION

FIGURE 30 ACETIC ACID SEGMENT TO LEAD ELECTRONIC WET CHEMICALS MARKET DURING FORECAST PERIOD

TABLE 27 ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 28 ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD

MILLION)

TABLE 29 ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022
(KILOTON)

TABLE 30 ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028
(KILOTON)

8.2 ACETIC ACID

8.2.1 RISING USE OF ETCHING CHEMICALS TO DRIVE DEMAND

8.3 ISOPROPYL ALCOHOL (IPA)

8.3.1 INCREASED DEMAND FROM VARIOUS END-USE INDUSTRIES

8.4 HYDROGEN PEROXIDE

8.4.1 INCREASED DEMAND FROM ETCHING AND CLEANING PROCESSES

8.5 HYDROCHLORIC ACIDS

8.5.1 GROWING DEMAND FROM SEMICONDUCTORS AND OIL & GAS
INDUSTRIES

8.6 AMMONIUM HYDROXIDE

8.6.1 CLEANING PROPERTIES OF AMMONIUM HYDROXIDE TO DRIVE DEMAND

8.7 HYDROFLUORIC ACID

8.7.1 INCREASING SEMICONDUCTOR DEMAND TO BOOST MARKET

8.8 NITRIC ACID

8.8.1 GROWING DEMAND FROM FOOD PROCESSING AND SEMICONDUCTOR
INDUSTRIES

8.9 PHOSPHORIC ACID

8.9.1 INCREASING DEMAND FROM DISPLAY PANELS TO BOOST MARKET

8.10 SULFURIC ACID

8.10.1 HIGH DEMAND FOR ICS AND PCBS FROM SEMICONDUCTOR INDUSTRY

8.11 OTHER TYPES

9 ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION

9.1 INTRODUCTION

FIGURE 31 SEMICONDUCTOR SEGMENT TO LEAD ELECTRONIC WET
CHEMICALS MARKET DURING FORECAST PERIOD

TABLE 31 ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022
(USD MILLION)

TABLE 32 ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028
(USD MILLION)

TABLE 33 ELECTRONIC WET CHEMICALS MARKET SIZE, BY APPLICATION,
2019–2022 (KILOTON)

TABLE 34 ELECTRONIC WET CHEMICALS MARKET SIZE, BY APPLICATION,

2023–2028 (KILOTON)

9.2 SEMICONDUCTOR

9.2.1 ADVANCES IN ELECTRONICS INDUSTRY TO BOOST DEMAND

9.2.2 CLEANING

9.2.3 ETCHING

9.3 IC PACKAGING

9.3.1 INCREASED COMPLEXITY OF SEMICONDUCTOR COMPONENTS TO BOOST MARKET

9.4 PCB

9.4.1 INCREASE IN DEMAND FOR PCB FROM COMMUNICATION & INFORMATION TECHNOLOGY INDUSTRIES

9.5 OTHER APPLICATIONS

10 ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY

10.1 INTRODUCTION

FIGURE 32 CONSUMER GOODS TO LEAD END-USE INDUSTRY SEGMENT

TABLE 35 ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 36 ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

10.2 CONSUMER GOODS

10.2.1 GROWTH IN SMART TECHNOLOGIES TO DRIVE MARKET

10.3 AUTOMOTIVE

10.3.1 GROWTH OF ELECTRIC & HYBRID VEHICLES TO DRIVE DEMAND

10.4 AEROSPACE & DEFENSE

10.4.1 INCREASED DEMAND FOR FUEL-EFFICIENT AND TECHNOLOGICALLY ADVANCED AIRCRAFT TO DRIVE MARKET

10.5 MEDICAL

10.5.1 DISINFECTING PROPERTIES OF HYDROGEN PEROXIDE & ISOPROPYL ALCOHOL TO DRIVE DEMAND

10.6 OTHER END-USE INDUSTRIES

11 ELECTRONIC WET CHEMICALS MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 33 ASIA PACIFIC TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD

TABLE 37 ELECTRONIC WET CHEMICALS MARKET, BY REGION, 2019–2022 (USD

MILLION)

TABLE 38 ELECTRONIC WET CHEMICALS MARKET, BY REGION, 2023–2028 (USD MILLION)

TABLE 39 ELECTRONIC WET CHEMICALS MARKET, BY REGION, 2019–2022 (KILOTON)

TABLE 40 ELECTRONIC WET CHEMICALS MARKET, BY REGION, 2023–2028 (KILOTON)

11.2 ASIA PACIFIC

11.2.1 RECESSION IMPACT

FIGURE 34 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET SNAPSHOT

TABLE 41 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 42 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 43 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (KILOTON)

TABLE 44 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 45 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 46 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 47 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (KILOTON)

TABLE 48 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 49 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 50 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 51 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 52 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 53 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 54 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 55 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY FORM,

2019–2022 (KILOTON)

TABLE 56 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

TABLE 57 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 58 ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.1 China

11.2.1.1.1 Largest semiconductor industry to drive market

TABLE 59 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 60 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 61 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 62 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 63 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 64 CHINA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.2 Japan

11.2.1.2.1 Leading companies increasing manufacturing capacity

TABLE 65 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 66 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 67 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 68 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 69 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 70 JAPAN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.3 India

11.2.1.3.1 Thriving electronics industry supporting market growth

TABLE 71 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 72 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 73 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 74 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 75 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 76 INDIA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.4 South Korea

11.2.1.4.1 Government initiatives, coupled with growing PCB and display production, to drive market

TABLE 77 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 78 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 79 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 80 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 81 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 82 SOUTH KOREA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.5 Taiwan

11.2.1.5.1 Presence of various large semiconductor manufacturers

TABLE 83 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 84 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 85 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 86 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 87 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 88 TAIWAN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.2.1.6 Rest of Asia Pacific

TABLE 89 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 90 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 91 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 92 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 93 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 94 REST OF ASIA PACIFIC: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.3 NORTH AMERICA

11.3.1 RECESSION IMPACT

FIGURE 35 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET SNAPSHOT

TABLE 95 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 96 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 97 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (KILOTON)

TABLE 98 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 99 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 100 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 101 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (KILOTON)

TABLE 102 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 103 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 104 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 105 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 106 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 107 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 108 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 109 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (KILOTON)

TABLE 110 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

TABLE 111 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 112 NORTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.3.1.1 US

11.3.1.1.1 Major investments in electronics industry, along with large semiconductor sector, to drive market

TABLE 113 US: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 114 US: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 115 US: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 116 US: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 117 US: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 118 US: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.3.1.2 Canada

11.3.1.2.1 Upcoming government investments and presence of leading semiconductor manufacturers

TABLE 119 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 120 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 121 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 122 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION,

2023–2028 (KILOTON)

TABLE 123 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 124 CANADA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.3.1.3 Mexico

11.3.1.3.1 Growing electronics industry, along with shift of manufacturing facilities from China, to drive market

TABLE 125 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 126 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 127 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 128 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 129 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 130 MEXICO: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4 EUROPE

11.4.1 RECESSION IMPACT

FIGURE 36 EUROPE: ELECTRONIC WET CHEMICALS MARKET SNAPSHOT

TABLE 131 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 132 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 133 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (KILOTON)

TABLE 134 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 135 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 136 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 137 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (KILOTON)

TABLE 138 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 139 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 140 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 141 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 142 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 143 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 144 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 145 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (KILOTON)

TABLE 146 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

TABLE 147 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 148 EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.1 Germany

11.4.1.1.1 Increased production of microelectronics to drive demand for electronic wet chemicals

TABLE 149 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 150 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 151 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 152 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 153 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 154 GERMANY: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.2 Italy

11.4.1.2.1 Significant demand in automotive sector to drive market

TABLE 155 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 156 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 157 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 158 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 159 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 160 ITALY: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.3 France

11.4.1.3.1 Increasing demand for semiconductors from various end-use industries to drive market

TABLE 161 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 162 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 163 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 164 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 165 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 166 FRANCE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.4 UK

11.4.1.4.1 Growing automotive industry to impact microelectronics industry

TABLE 167 UK: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 168 UK: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 169 UK: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 170 UK: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 171 UK: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 172 UK: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.5 Spain

11.4.1.5.1 Growing semiconductor industry to create demand

TABLE 173 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 174 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 175 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 176 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 177 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 178 SPAIN: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.4.1.6 Rest of Europe

TABLE 179 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 180 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 181 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 182 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 183 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 184 REST OF EUROPE: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5 MIDDLE EAST & AFRICA

11.5.1 RECESSION IMPACT

TABLE 185 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 186 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 187 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (KILOTON)

TABLE 188 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 189 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 190 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 191 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (KILOTON)

TABLE 192 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 193 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 194 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 195 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 196 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 197 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 198 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 199 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (KILOTON)

TABLE 200 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

TABLE 201 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 202 MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5.2 GCC COUNTRIES

11.5.2.1 Saudi Arabia

11.5.2.1.1 Government initiatives to boost economy, along with increasing consumer demand, to drive market

TABLE 203 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 204 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 205 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 206 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 207 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY END-

USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 208 SAUDI ARABIA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5.2.2 Israel

11.5.2.2.1 Increasing number of chip manufacturers to drive demand

TABLE 209 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 210 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 211 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 212 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 213 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 214 ISRAEL: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5.2.3 Rest of GCC countries

TABLE 215 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 216 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 217 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 218 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 219 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 220 REST OF GCC COUNTRIES: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5.2.4 South Africa

11.5.2.4.1 Increased demand for consumer electronics to drive market

TABLE 221 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 222 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 223 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 224 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY

APPLICATION, 2023–2028 (KILOTON)

TABLE 225 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 226 SOUTH AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.5.2.5 Rest of Middle East & Africa

TABLE 227 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 228 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 229 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 230 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 231 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 232 REST OF MIDDLE EAST & AFRICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.6 SOUTH AMERICA

11.6.1 RECESSION IMPACT

TABLE 233 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 234 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 235 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2019–2022 (KILOTON)

TABLE 236 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY COUNTRY, 2023–2028 (KILOTON)

TABLE 237 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (USD MILLION)

TABLE 238 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (USD MILLION)

TABLE 239 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2019–2022 (KILOTON)

TABLE 240 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY TYPE, 2023–2028 (KILOTON)

TABLE 241 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 242 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY

APPLICATION, 2023–2028 (USD MILLION)

TABLE 243 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 244 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 245 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (USD MILLION)

TABLE 246 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (USD MILLION)

TABLE 247 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2019–2022 (KILOTON)

TABLE 248 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY FORM, 2023–2028 (KILOTON)

TABLE 249 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 250 SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.6.1.1 Brazil

11.6.1.1.1 Increasing investments by leading chip manufacturing companies to drive market

TABLE 251 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 252 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 253 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 254 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 255 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 256 BRAZIL: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.6.1.2 Argentina

11.6.1.2.1 Growth of electronics industry to drive demand

TABLE 257 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 258 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 259 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY

APPLICATION, 2019–2022 (KILOTON)

TABLE 260 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 261 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 262 ARGENTINA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

11.6.1.3 Rest of South America

TABLE 263 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 264 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 265 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2019–2022 (KILOTON)

TABLE 266 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY APPLICATION, 2023–2028 (KILOTON)

TABLE 267 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2019–2022 (USD MILLION)

TABLE 268 REST OF SOUTH AMERICA: ELECTRONIC WET CHEMICALS MARKET, BY END-USE INDUSTRY, 2023–2028 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 INTRODUCTION

TABLE 269 OVERVIEW OF STRATEGIES ADOPTED BY KEY ELECTRONIC WET CHEMICAL MANUFACTURERS

12.2 MARKET SHARE ANALYSIS

12.2.1 RANKING OF KEY MARKET PLAYERS, 2022

FIGURE 37 RANKING OF TOP FIVE PLAYERS IN ELECTRONIC WET CHEMICALS MARKET, 2022

12.2.2 MARKET SHARE OF KEY PLAYERS

TABLE 270 ELECTRONIC WET CHEMICALS MARKET: DEGREE OF COMPETITION

FIGURE 38 ELECTRONIC WET CHEMICALS MARKET IN 2022

12.3 REVENUE ANALYSIS

FIGURE 39 REVENUE OF KEY PLAYERS, 2021–2024

12.4 COMPANY EVALUATION MATRIX

12.4.1 STARS

12.4.2 EMERGING LEADERS

12.4.3 PERVASIVE PLAYERS

12.4.4 PARTICIPANTS

FIGURE 40 ELECTRONIC WET CHEMICALS MARKET: COMPANY EVALUATION MATRIX, 2022

12.4.5 COMPANY FOOTPRINT

TABLE 271 KEY COMPANY APPLICATION FOOTPRINT

TABLE 272 KEY COMPANY TYPE FOOTPRINT

TABLE 273 KEY COMPANY FORM FOOTPRINT

TABLE 274 KEY COMPANY END-USE INDUSTRY FOOTPRINT

TABLE 275 KEY COMPANY REGION FOOTPRINT

12.5 START-UP/SME EVALUATION MATRIX

12.5.1 PROGRESSIVE COMPANIES

12.5.2 RESPONSIVE COMPANIES

12.5.3 DYNAMIC COMPANIES

12.5.4 STARTING BLOCKS

FIGURE 41 ELECTRONIC WET CHEMICALS MARKET: START-UPS/SMES EVALUATION MATRIX, 2022

12.5.5 COMPETITIVE BENCHMARKING

TABLE 276 DETAILED LIST OF KEY START-UPS/SMES

FIGURE 42 BUSINESS STRATEGY FOOTPRINT

FIGURE 43 PRODUCT OFFERING STRATEGY

TABLE 277 SME APPLICATION FOOTPRINT

TABLE 278 SME TYPE FOOTPRINT

TABLE 279 SME FORM FOOTPRINT

TABLE 280 SME END-USE INDUSTRY FOOTPRINT

TABLE 281 SME REGION FOOTPRINT

12.6 COMPETITIVE SCENARIOS AND TRENDS

12.6.1 PRODUCT LAUNCHES

TABLE 282 ELECTRONIC WET CHEMICALS MARKET: PRODUCT LAUNCHES (2019–2023)

12.6.2 DEALS

TABLE 283 ELECTRONIC WET CHEMICALS MARKET: DEALS (2019–2023)

12.6.3 OTHER DEVELOPMENTS

TABLE 284 ELECTRONIC WET CHEMICALS MARKET: OTHER DEVELOPMENTS (2019–2023)

13 COMPANY PROFILES

(Business overview, Products/Solutions/Services offered, Recent Developments, MnM view, Right to win, Strategic choices, Weaknesses and competitive threats)*

13.1 KEY PLAYERS

13.1.1 AVANTOR INC.

TABLE 285 AVANTOR INC.: COMPANY OVERVIEW
FIGURE 44 AVANTOR INC.: COMPANY SNAPSHOT
TABLE 286 AVANTOR INC.: PRODUCT OFFERINGS
TABLE 287 AVANTOR INC.: DEALS

13.1.2 BASF SE

TABLE 288 BASF SE: COMPANY OVERVIEW
FIGURE 45 BASF SE.: COMPANY SNAPSHOT
TABLE 289 BASF SE: PRODUCT OFFERINGS
TABLE 290 BASF SE: PRODUCT LAUNCHES
TABLE 291 BASF SE: DEALS

13.1.3 CABOT MICROELECTRONICS CORPORATION

TABLE 292 CABOT MICROELECTRONICS CORPORATION: COMPANY OVERVIEW
FIGURE 46 CABOT MICROELECTRONICS CORPORATION: COMPANY SNAPSHOT
TABLE 293 CABOT MICROELECTRONICS CORPORATION: PRODUCT OFFERINGS
TABLE 294 CABOT MICROELECTRONICS CORPORATION: PRODUCT LAUNCHES
TABLE 295 CABOT MICROELECTRONICS CORPORATION: DEALS

13.1.4 HONEYWELL INTERNATIONAL INC.

TABLE 296 HONEYWELL INTERNATIONAL INC: COMPANY OVERVIEW
FIGURE 47 HONEYWELL INTERNATIONAL INC: COMPANY SNAPSHOT
TABLE 297 HONEYWELL INTERNATIONAL INC: PRODUCT OFFERINGS
TABLE 298 HONEYWELL INTERNATIONAL INC: DEALS

13.1.5 KANTO CHEMICAL INDUSTRY CO. LTD.

TABLE 299 KANTO CHEMICAL INDUSTRY CO. LTD.: COMPANY OVERVIEW
TABLE 300 KANTO CHEMICAL INDUSTRY CO. LTD.: PRODUCT OFFERINGS
TABLE 301 KANTO CHEMICAL INDUSTRY CO. LTD.: OTHER DEVELOPMENTS

13.1.6 EASTMAN CHEMICAL COMPANY

TABLE 302 EASTMAN CHEMICAL COMPANY: COMPANY OVERVIEW
FIGURE 48 EASTMAN CHEMICAL COMPANY: COMPANY SNAPSHOT
TABLE 303 EASTMAN CHEMICAL COMPANY: PRODUCT OFFERINGS
TABLE 304 EASTMAN CHEMICAL CO.: OTHER DEVELOPMENTS

13.1.7 SOLVAY

TABLE 305 SOLVAY: COMPANY OVERVIEW
FIGURE 49 SOLVAY: COMPANY SNAPSHOT
TABLE 306 SOLVAY: PRODUCT OFFERINGS
TABLE 307 SOLVAY: PRODUCT LAUNCH
TABLE 308 SOLVAY: DEALS
TABLE 309 SOLVAY: OTHERS

13.1.8 FUJIFILM HOLDINGS CORPORATION

TABLE 310 FUJIFILM HOLDINGS CORPORATION: COMPANY OVERVIEW
FIGURE 50 FUJIFILM HOLDINGS CORPORATION: COMPANY SNAPSHOT
TABLE 311 FUJIFILM HOLDINGS CORPORATION: PRODUCT OFFERINGS
TABLE 312 FUJIFILM HOLDINGS CORPORATION: DEALS
TABLE 313 FUJIFILM HOLDINGS CORPORATION: OTHERS

13.1.9 TECHNIC INC.

TABLE 314 TECHNIC INC.: COMPANY OVERVIEW
TABLE 315 TECHNIC INC.: PRODUCT OFFERINGS
TABLE 316 TECHNIC INC.: PRODUCT LAUNCHES
TABLE 317 TECHNIC INC.: DEALS
TABLE 318 TECHNIC INC.: OTHER

13.1.10 LINDE PLC

TABLE 319 LINDE PLC: COMPANY OVERVIEW
TABLE 320 LINDE PLC: PRODUCT OFFERINGS
TABLE 321 LINDE PLC: DEALS
TABLE 322 LINDE PLC: OTHERS

*Details on Business overview, Products/Solutions/Services offered, Recent Developments, MnM view, Right to win, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

13.2 OTHER PLAYERS

13.2.1 MITSUBISHI CHEMICAL CORPORATION

TABLE 323 MITSUBISHI CHEMICAL CORPORATION: COMPANY OVERVIEW

13.2.2 AIR PRODUCTS AND CHEMICALS INC.

TABLE 324 AIR PRODUCTS AND CHEMICALS INC.: COMPANY OVERVIEW

13.2.3 ZHEJIANG KAISN FLUOROCHEMICAL CO. LTD

TABLE 325 ZHEJIANG KAISN FLUOROCHEMICAL CO. LTD: COMPANY OVERVIEW

13.2.4 KREDENCE PVT. LTD.

TABLE 326 KREDENCE PVT. LTD.: COMPANY OVERVIEW

13.2.5 SAREX CHEMICALS LTD.

TABLE 327 SAREX CHEMICALS LTD.: COMPANY OVERVIEW

13.2.6 T.N.C. INDUSTRIAL CO. LTD

TABLE 328 T.N.C. INDUSTRIAL CO. LTD: COMPANY OVERVIEW

13.2.7 TRANSENE COMPANY INC.

TABLE 329 TRANSENE COMPANY INC.: COMPANY OVERVIEW

13.2.8 PARKER DOMNICK HUNTER

TABLE 330 PARKER DOMNICK HUNTER: COMPANY OVERVIEW

13.2.9 SONGWON

TABLE 331 SONGWON: COMPANY OVERVIEW

13.2.10 ENTEGRIS

TABLE 332 ENTEGRIS: COMPANY OVERVIEW

13.2.11 ALFA CHEMISTRY

TABLE 333 ALFA CHEMISTRY: COMPANY OVERVIEW

13.2.12 ASIA UNION ELECTRONIC CHEMICAL CORP.

TABLE 334 ASIA UNION ELECTRONIC CHEMICAL CORP.: COMPANY OVERVIEW

13.2.13 TOKYO OHKA KOGYO

TABLE 335 TOKYO OHKA KOGYO: COMPANY OVERVIEW

13.2.14 JSR CORPORATION

TABLE 336 JSR CORPORATION: COMPANY OVERVIEW

13.2.15 SHIN-ETSU CHEMICAL CO., LTD.

TABLE 337 SHIN-ETSU CHEMICAL CO., LTD.: COMPANY OVERVIEW

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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