

High-purity Nitric Acid Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

High-purity Nitric Acid Market Summary

The global high-purity nitric acid market, also referred to as electronic grade nitric acid, serves as a critical chemical in semiconductor manufacturing, display panel production, and solar cell fabrication. This specialized form of nitric acid is characterized by extremely low levels of metallic and ionic impurities, ensuring compatibility with advanced electronics processes that demand exceptional chemical purity. By 2025, the global market is estimated to reach between USD 100 million and USD 200 million, with a projected compound annual growth rate (CAGR) of 6.5% to 9.5% through 2030. The market growth is primarily driven by the expansion of semiconductor fabrication, high-resolution display panels, and photovoltaic solar cell production, particularly in Asia-Pacific and North America. High-purity nitric acid is manufactured to meet stringent electronic-grade specifications, with impurity concentrations often measured in parts per billion (ppb) or lower. Its applications in semiconductor etching, wafer cleaning, and metal surface treatment demand consistent quality, high reliability, and compliance with industry standards for electronic-grade chemicals. The product is typically produced through high-purity raw material processing, rigorous purification methods, and controlled storage to avoid contamination.

Its primary applications are:

Semiconductor: Used in wafer cleaning, surface preparation, and etching processes. This segment represents the largest portion of the market, driven by the rapid growth in semiconductor fabrication facilities globally.

Display: Applied in the production of LCD, OLED, and other high-resolution panels for consumer electronics. Growth in smartphones, tablets, and large-format displays contributes to stable demand.

Solar: Utilized in the production of high-efficiency photovoltaic cells, including crystalline silicon and thin-film technologies. Renewable energy adoption and solar panel deployment continue to support this segment's expansion.

Market Size and Growth Outlook

The high-purity nitric acid market is forecast to experience steady growth, reflecting the increasing complexity and miniaturization of semiconductor devices, as well as the expansion of display and solar manufacturing capacity worldwide. By 2025, market size is projected at USD 100–200 million, with a CAGR of 6.5%–9.5% through 2030. This growth is underpinned by the increasing number of semiconductor fabs, the rising adoption of advanced display technologies, and global initiatives to expand solar energy production.

Regional Market Trends

North America: Steady growth, primarily driven by semiconductor fabs and advanced research in microelectronics. Estimated CAGR: 6%–8%. Columbus Chemical Industries (CCI), with facilities in Columbus, WI, and Phoenix, AZ, is one of the leading suppliers serving this region.

Asia-Pacific: The largest and fastest-growing market, led by China, Japan, and South Korea. Estimated CAGR: 7%–10%. Key drivers include semiconductor manufacturing expansion, increased solar panel production, and large-scale display fabrication. UBE Corporation, headquartered in Tokyo, is expanding production capacity at its Ube Chemical Factory in Yamaguchi Prefecture, Japan, by approximately 30% to meet rising demand. Suzhou Crystal Clear Chemical Co Ltd, with a production capacity of 5,000 tons, is a significant Chinese supplier. GrandiT Co. Ltd., with an annual capacity of 15,000 tons, also strengthens regional supply.

Europe: Moderate growth driven by semiconductor and display applications. Estimated CAGR: 6%–8%. Some supply consolidation is occurring due to capacity rationalization among legacy producers.

Latin America: Limited but growing demand, mainly for solar and electronics applications. Estimated CAGR: 5%–7%.

Middle East & Africa (MEA): Niche applications in high-tech electronics and solar energy. Estimated CAGR: 4%–6%.

Company Profiles

Honeywell: A key global supplier providing high-purity nitric acid and other electronic-grade chemicals for semiconductor and display applications.

UBE Corporation: Japan-based company expanding production capacity to meet future demand for high-purity nitric acid in semiconductor and solar applications.

KANTO CHEMICAL: Supplies electronic-grade chemicals to semiconductor fabs and display manufacturers, with expertise in ultra-pure nitric acid production.

Columbus Chemical Industries (CCI): One of the largest U.S. producers, with manufacturing sites in Columbus, WI, and Phoenix, AZ. Supplies high-purity nitric acid to semiconductor and specialty chemical markets.

Mitsubishi Chemical: The company plans to discontinue production at its Onahama and Iwaki plants by March 2027, which may impact regional supply and encourage market shifts toward other producers.

GrandiT Co. Ltd.: Offers large-scale production with a capacity of 15,000 tons, serving electronics and industrial applications.

Suzhou Crystal Clear Chemical Co Ltd: Chinese supplier with a 5,000-ton capacity, strategically positioned to support domestic semiconductor and display production.

Jiangyin Jianghua Micro-electronics Material Co. Ltd., Hangzhou Greenland Electronic Materials Co. Ltd., Jiangyin Runma Electronic Material Co. Ltd., Asia Union Electronic Chemical Corporation (AUECC): Regional suppliers catering primarily to Asia-Pacific markets, offering high-purity nitric acid for semiconductor, display, and solar applications.

Industry Value Chain Analysis

The high-purity nitric acid value chain begins with high-purity ammonia and nitric acid synthesis, followed by purification and electronic-grade treatment. Manufacturers implement rigorous quality control, including filtration, deionization, and contamination prevention, to maintain ppb-level impurity specifications. Downstream, high-purity nitric acid is used in semiconductor etching, wafer cleaning, display panel fabrication, and photovoltaic cell production. Vertical integration allows some producers to combine chemical production with downstream semiconductor and display supply chains, enhancing reliability, reducing lead times, and ensuring consistent quality.

Logistics and storage are crucial, as electronic-grade nitric acid must be transported in ultra-clean containers and handled under controlled conditions to prevent contamination. The market is highly dependent on reliable supply chains and strategic production locations, particularly in North America and Asia-Pacific.

Opportunities and Challenges

Opportunities:

Expansion of semiconductor fabrication facilities and advanced technology nodes increases demand for ultra-pure chemicals.

Growth in high-resolution display panels and next-generation solar modules provides new end-use applications.

Regional production expansions, such as UBE Corporation's capacity increase, support market growth and reduce potential supply shortages.

Increasing demand for renewable energy and electronics miniaturization drives consistent adoption of electronic-grade nitric acid.

Challenges:

High manufacturing and purification costs pose entry barriers for new producers.

Supply disruptions from plant closures, such as Mitsubishi Chemical's phased discontinuation, may affect regional availability.

Maintaining ultra-low impurity levels requires strict process controls, increasing operational complexity.

Market growth is sensitive to cyclical semiconductor and display industry trends, making long-term forecasting challenging.

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