

Electronic Chemicals CDMO & CRO Market by Type (High Performance Polymers, Acid & Base Chemicals, Gases, Metals & Pastes), Scale, Application (Photoresist, Etchants, Dopants, Cleaning, Deposition), End-Use & Region-Global Forecast to 2029

Market Report | 2024-12-12 | 274 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The electronic chemicals CDMO and CRO market is projected to reach USD 0.66 billion by 2029, at a CAGR of 6.8% from USD 0.48 billion in 2024.

"Growing trend of miniaturization has resulted into increased investment in electronics industry "

Electronics miniaturization has dramatically altered the face of electronic chemicals, particularly for companies that are interested in CDMOs and CROs. Such a trend demands not only advanced chemical formulations but also ultra-high purity standards for the tiny, intricate components that make up today's electronics. Because semiconductors and other electronic components are being scaled down in size, minor impurities can cause failure in performance, affecting the quality and functionality of the final product. CDMOs and CROs invest heavily in research and development to create materials that are up to these challenging standards, keeping pace with industry trends of reducing component size while improving functionality.

This sector also has important R&D investment requirements since developing high-performance ultra-pure materials involves intricate processes with heavy cost inputs. It has been estimated, for example, that according to industry reports, electronic chemical market worldwide will exhibit healthy growth, given increased demands on miniaturization for electronics and semiconductors. This demand calls for improvement among CDMOs and CROs on how they offer high-purity chemicals necessary for stages in the electronic manufacturing processes such as etching, cleaning, and deposition that require lithography. The smallest nodes involve extreme precision and stability that demands to operate at their targeted levels of consumer electronics applications, automotive electronics applications, and much more.

This miniaturization trend has motivated CDMOs and CROs to invest in special facilities and equipment that would help them achieve the desired levels of purity and consistency expected by their clients.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

"Gases, by type, accounts for the largest market share in terms of volume in 2023."

The fastest-growing type is the gases segment in terms of volume of the electronics chemicals CDMO and CRO market because these are considered essential in the semiconductor manufacturing and advanced electronics production processes. Gases such as nitrogen, hydrogen, argon, and specialty gases, such as silane, ammonia, and fluorinated compounds, are absolutely needed in each stage of semiconductor fabrication, namely deposition, etching, doping, and cleaning processes. The demand for semiconductors is increasing in applications, such as artificial intelligence, 5G technologies, electric vehicles, and renewable energy systems. This led to a need for higher purity electronic gases, especially for high-precision efficiency in the fabrication of the wafer, which ensures smaller, more efficient, and complex chips. Overall, expansion within the global semiconductor industry coupled with a continued pace in electronic device technologies represents vital factors responsible for the exponential increase of gases in this market.

"Large have the largest market share in terms of volume in 2023."

Large-scale production is going to be the major market segment for electronics chemicals CDMO and CRO because of high demand for cost efficiency, quality output, and scaling in meeting the increasing requirements of the electronics and semiconductor industry. The rapid growth in adoption of advanced technologies, including 5G, artificial intelligence, electric vehicles, and renewable energy systems, has increased the demand for the mass production of microelectronic components such as semiconductors, chips, and display panels. Large-scale facilities enable the manufacturers to face this increasing demand effectively.

Large-scale operations are of prime importance to achieve economy of scale, which reduces the cost of production while maintaining consistency and quality. These facilities cater to large-scale production for etchants, photoresists, and deposition material for high-volume electronics. This ensures that supply chains on a global level do not experience any disruption and will meet the needs of most industries that rely on the just-in-time production system.

"Cleaning Agents have the largest market share in terms of volume in 2023."

Cleaning agents should be the largest segment within the electronics chemicals CDMO and CRO market owing to their indispensable role in preserving the stringent purity and quality standards required in the microelectronics and semiconductor manufacturing sectors. These agents are therefore critical for removing contaminants, particulate matter, and residues from wafers, components, and surfaces at various steps in semiconductor manufacturing. As semiconductor technology advances toward smaller node sizes, cleaning agents are essential to achieving defect-free surfaces and ensuring the optimal performance of microelectronics. Applications such as wafer cleaning, photomask cleaning, and tool maintenance rely on these specialized chemicals, which must meet ultra-high purity standards to prevent adverse impacts on device performance.

"Optoelectronics have the largest market share in terms of volume in 2023."

Optoelectronics will be the biggest application segment for the electronics chemicals CDMO and CRO market, in view of its high pace of adoption across diverse applications and due to its role at the very heart of modern technology. It encompasses light-emitting diodes, laser diodes, photovoltaic cells, and optical sensors; these products are an essential part of industries ranging from telecommunication and consumer electronics to automobile. Global demand for advanced display technologies, including OLEDs and micro-LEDs in smartphones, TVs, and wearable devices, has significantly increased the consumption of optoelectronic materials. Furthermore, increasing the use of optical sensors in autonomous vehicles and smart devices increases the demand even further. These devices need very specialized electronic chemicals, including deposition materials and photoresists, to provide precision and performance in optoelectronic components. With its ability to support diverse, high-growth industries combined with technological advancements, optoelectronics is a leading segment in the electronics chemicals CDMO and CRO market. Its growth mirrors the increased dependence on advanced technologies in daily life and industrial processes.

"Based on region, North America was the second largest market in 2023."

North America, in particular, is expected to be the second largest of the CDMO and CRO markets for electronics chemicals by virtue of its robust high-technology industry base, leading edge semiconductor manufacturing, and highly strong R&D ecosystems. North America is also home to among the world's largest electronics and semiconductor manufacturers. Among Silicon Valley and other major technology complexes, this region provides important demand for specialty electronic chemicals. Growing adoption of cutting-edge technologies such as 5G, artificial intelligence, autonomous vehicles, and renewable energy

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

would drive the consumption of chemicals like photoresists, etchants, and high-purity cleaning agents. Moreover, North America's leadership in optoelectronics, especially applications in telecommunications and automotive, reinforces the demand for electronic chemicals in the region. Further, the presence of leading CDMO and CRO players and advanced chemical manufacturing facilities adds to the growth of this 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 - 35%, and Tier 3 - 25%

-□By Designation: Manger-Level - 30%, Director Level - 20%, and Others - 50%

-□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 Sajjan India Ltd. (India), Cohance Lifesciences (India), noctiluca (Poland), Actylis (US), AGC Inc. (Japan), Navin Fluorine International limited (India), CABB Group GmbH (Germany), Adesis Inc. (US), Inventys Research Company (India), LinkChem Technology Co.,Ltd.(China), among others.

Research Coverage

This report segments the market for the electronic chemicals CDMO and CRO market on the basis of type, scale, end-use, application 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 partnerships associated with the market for the electronic chemicals CDMO and CRO 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 chemicals CDMO and CRO market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

-□Analysis of key drivers: Expanding electronic sectors, along with growing trend of miniaturization are some of the key driving forces of electronics chemicals CDMO and CRO market

-□Market Penetration: Comprehensive information on the electronic chemicals CDMO and CRO market offered by top players in the global electronic chemicals CDMO and CRO market.

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

-□Market Development: Comprehensive information about lucrative emerging markets ? the report analyzes the markets for the electronic chemicals CDMO and CRO across regions.

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

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

Table of Contents:

| | |
|----------------------------------|----|
| 1□INTRODUCTION□ | 28 |
| 1.1□STUDY OBJECTIVES□ | 28 |
| 1.2□MARKET DEFINITION□ | 28 |
| 1.3□STUDY SCOPE□ | 29 |
| 1.3.1□MARKETS COVERED□ | 29 |
| 1.3.2□YEARS CONSIDERED□ | 30 |
| 1.3.3□INCLUSIONS AND EXCLUSIONS□ | 30 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|---------|---|----|
| 1.3.4 | CURRENCY CONSIDERED | 31 |
| 1.3.5 | UNITS CONSIDERED | 31 |
| 1.4 | LIMITATIONS | 31 |
| 1.5 | STAKEHOLDERS | 31 |
| 2 | RESEARCH METHODOLOGY | 32 |
| 2.1 | RESEARCH DATA | 32 |
| 2.1.1 | SECONDARY DATA | 33 |
| 2.1.1.1 | Key data from secondary sources | 33 |
| 2.1.2 | PRIMARY DATA | 33 |
| 2.1.2.1 | Key data from primary sources | 34 |
| 2.1.2.2 | Key primary sources | 34 |
| 2.1.2.3 | Key participants for primary interviews | 34 |
| 2.1.2.4 | Breakdown of primary interviews | 35 |
| 2.1.2.5 | Key industry insights | 35 |
| 2.2 | BASE NUMBER CALCULATION | 36 |
| 2.2.1 | SUPPLY-SIDE ANALYSIS | 36 |
| 2.2.2 | DEMAND-SIDE ANALYSIS | 36 |
| 2.3 | FORECASTS | 37 |
| 2.3.1 | SUPPLY SIDE | 37 |
| 2.3.2 | DEMAND SIDE | 37 |
| 2.4 | MARKET SIZE ESTIMATION | 37 |
| 2.4.1 | BOTTOM-UP APPROACH | 38 |
| 2.4.2 | TOP-DOWN APPROACH | 39 |
| 2.5 | DATA TRIANGULATION | 40 |
| 2.6 | RESEARCH ASSUMPTIONS | 41 |
| 2.7 | GROWTH FORECAST | 41 |
| 2.8 | RISK ASSESSMENT | 42 |
| 2.9 | FACTOR ANALYSIS | 43 |
| 3 | EXECUTIVE SUMMARY | 44 |
| 4 | PREMIUM INSIGHTS | 50 |
| 4.1 | ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ELECTRONIC CHEMICALS CDMO & CRO MARKET | 50 |
| 4.2 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY TYPE | 51 |
| 4.3 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY APPLICATION | 51 |
| 4.4 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY SCALE | 52 |
| 4.5 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY END-USE INDUSTRY | 52 |
| 4.6 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY COUNTRY | 53 |
| 5 | MARKET OVERVIEW | 54 |
| 5.1 | INTRODUCTION | 54 |
| 5.2 | MARKET DYNAMICS | 54 |
| 5.2.1 | DRIVERS | 55 |
| 5.2.1.1 | Expanding semiconductors industry pushing production of electronic chemicals through CDMOs | 55 |
| 5.2.1.2 | Acceleration in adoption of advanced technologies and cloud computing | 55 |
| 5.2.1.3 | Growing trend of miniaturization resulting in increased investments in electronics industry | 56 |
| 5.2.2 | RESTRAINTS | 56 |
| 5.2.2.1 | Electronics outsourcing resulting in working with external partners | 56 |
| 5.2.3 | OPPORTUNITIES | 57 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|---------|--|----|
| 5.2.3.1 | Development of AI-optimized hardware leading to need for specialized chips and sensors with high processing power and efficiency | 57 |
| 5.2.3.2 | Rapid growth of high-frequency technologies | 57 |
| 5.2.4 | CHALLENGES | 58 |
| 5.2.4.1 | Strict regulations pertaining to products incorporating advanced technologies | 58 |
| 5.3 | IMPACT OF GENERATIVE AI ON ELECTRONIC CHEMICALS CDMO & CRO MARKET | 59 |
| 5.3.1 | INTRODUCTION | 59 |
| 5.4 | IMPACT ON ELECTRONIC CHEMICALS CDMO & CRO MARKET | 60 |
| 6 | INDUSTRY TRENDS | 61 |
| 6.1 | INTRODUCTION | 61 |
| 6.2 | TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS | 61 |
| 6.3 | SUPPLY CHAIN ANALYSIS | 62 |
| 6.3.1 | RAW MATERIAL SOURCING | 63 |
| 6.3.2 | MANUFACTURING AND FORMULATION | 63 |
| 6.3.3 | CLIENT SERVICES AND CUSTOMIZATION | 64 |
| 6.3.4 | END USER | 64 |
| 6.4 | INVESTMENT AND FUNDING SCENARIO | 65 |
| ? | | |
| 6.5 | PRICING ANALYSIS | 65 |
| 6.5.1 | AVERAGE SELLING PRICE TREND, BY REGION | 65 |
| 6.5.2 | AVERAGE SELLING PRICE TREND OF ELECTRONIC CHEMICALS IN CDMO & CRO MARKET, BY TYPE | 66 |
| 6.5.3 | AVERAGE SELLING PRICE TREND OF ELECTRONIC CHEMICALS IN CDMO & CRO MARKET, BY TYPE AND TOP 5 PLAYERS | 66 |
| 6.6 | ECOSYSTEM ANALYSIS | 67 |
| 6.7 | TECHNOLOGY ANALYSIS | 68 |
| 6.8 | PATENT ANALYSIS | 70 |
| 6.8.1 | METHODOLOGY | 70 |
| 6.8.2 | PATENTS GRANTED WORLDWIDE, 2014-2023 | 70 |
| 6.8.3 | PATENT PUBLICATION TRENDS, 2014-2023 | 71 |
| 6.8.4 | INSIGHTS | 71 |
| 6.8.5 | LEGAL STATUS OF PATENTS | 71 |
| 6.8.6 | JURISDICTION ANALYSIS | 72 |
| 6.8.7 | TOP COMPANIES/APPLICANTS | 73 |
| 6.8.8 | LIST OF MAJOR PATENTS | 74 |
| 6.9 | TRADE ANALYSIS | 75 |
| 6.9.1 | IMPORT SCENARIO | 75 |
| 6.9.2 | EXPORT SCENARIO | 76 |
| 6.10 | KEY CONFERENCES AND EVENTS | 77 |
| 6.11 | TARIFF AND REGULATORY LANDSCAPE | 78 |
| 6.11.1 | TARIFF DATA RELATED TO ELECTRONIC CHEMICALS CDMO & CRO MARKET | 78 |
| 6.11.2 | REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS | 79 |
| 6.11.3 | REGULATIONS RELATED TO ELECTRONIC CHEMICALS CDMO & CRO MARKET | 82 |
| 6.12 | PORTER'S FIVE FORCES ANALYSIS | 84 |
| 6.12.1 | IMPACT OF PORTER'S FIVE FORCES ON ELECTRONIC CHEMICALS CDMO & CRO MARKET | 84 |
| 6.12.2 | BARGAINING POWER OF SUPPLIERS | 85 |
| 6.12.3 | THREAT OF NEW ENTRANTS | 85 |
| 6.12.4 | THREAT OF SUBSTITUTES | 85 |
| 6.12.5 | BARGAINING POWER OF BUYERS | 85 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.12.6 INTENSITY OF COMPETITIVE RIVALRY 86
- 6.13 KEY STAKEHOLDERS AND BUYING CRITERIA 86
- 6.13.1 KEY STAKEHOLDERS IN BUYING PROCESS 86
- 6.13.2 BUYING CRITERIA 87
- 6.14 MACROECONOMIC INDICATORS 88
- 6.14.1 GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES 88
- 6.15 CASE STUDY ANALYSIS 89
- 6.15.1 INNOVATIONS AND OUTSOURCING IN ELECTRONIC CHEMICALS CDMO & CRO SERVICES 89
- 6.15.2 INTEL'S TRANSITION TO AQUEOUS-BASED CLEANING IN PCB MANUFACTURING 89
- 6.15.3 ADVANCING PRECISION IN ELECTRONIC CHEMICALS: ROLE OF CDMOS AND CROS IN MEETING SMART ELECTRONICS DEMANDS 90
- 7 ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY TYPE 91
- 7.1 INTRODUCTION 92
- 7.2 HIGH-PERFORMANCE POLYMERS 94
- 7.2.1 OFFER DURABILITY AND STABILITY UNDER HIGH TEMPERATURES AND CHEMICAL EXPOSURE 94
- 7.3 ACID AND BASE CHEMICALS 94
- 7.3.1 MINIATURIZATION OF ELECTRONIC COMPONENTS TO DRIVE DEMAND 94
- 7.4 GASES 94
- 7.4.1 INDISPENSABLE FOR ENABLING PRECISE THIN-FILM DEPOSITION, SURFACE TREATMENTS, AND CONTAMINATION-FREE ENVIRONMENTS 94
- 7.5 POWDERS 95
- 7.5.1 FACILITATE HIGH-SPEED CONNECTIVITY AND EFFICIENT HEAT DISSIPATION IN MODERN DEVICES 95
- 7.6 METALS AND PASTES 95
- 7.6.1 USED FOR CONDUCTIVITY, INTERCONNECTIONS, AND BONDING IN SEMICONDUCTOR DEVICES AND ELECTRONIC ASSEMBLIES 95
- 7.7 OTHER TYPES 96
- 8 ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY SCALE 97
- 8.1 INTRODUCTION 98
- 8.2 LARGE SCALE 99
- 8.2.1 LARGE-SCALE CDMO SERVICES EMPOWER MASS-MARKET APPLICATIONS 99
- 8.3 MEDIUM SCALE 100
- 8.3.1 MEDIUM-SCALE CDMO SERVICES OPTIMIZE INNOVATION FOR NICHE AND EMERGING APPLICATIONS 100
- 8.4 SMALL SCALE 101
- 8.4.1 SMALL-SCALE CDMO SERVICES CATALYZE INNOVATION IN SPECIALIZED MARKETS 101
- 9 ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY APPLICATION 102
- 9.1 INTRODUCTION 103
- 9.2 PHOTORESISTS 105
- 9.2.1 GROWING DEMAND FOR ADVANCED ELECTRONICS AND MINIATURIZATION TREND TO DRIVE GROWTH 105
- 9.3 ETCHANTS 105
- 9.3.1 DEVELOPMENTS IN FLEXIBLE AND WEARABLE ELECTRONICS TO DRIVE GROWTH 105
- 9.4 DOPANTS 106
- 9.4.1 KEY TO MODIFYING SEMICONDUCTOR MATERIALS FOR PRECISE ELECTRICAL PROPERTIES 106
- ?
- 9.5 CLEANING AGENTS 106
- 9.5.1 ENSURE REMOVAL OF CONTAMINANTS TO MAINTAIN INTEGRITY OF ELECTRONIC DEVICES 106
- 9.6 DEPOSITION MATERIALS 107
- 9.6.1 ENABLE PRECISE LAYERING OF SUBSTANCES ESSENTIAL FOR FABRICATION OF ADVANCED ELECTRONIC DEVICES 107

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|----------|--|-----|
| 9.7 | OTHER APPLICATIONS | 107 |
| 9.7.1 | THERMAL INTERFACE MATERIALS | 107 |
| 9.7.2 | CHEMICAL MECHANICAL PLANARIZATION | 108 |
| 10 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY END-USE INDUSTRY | 109 |
| 10.1 | INTRODUCTION | 110 |
| 10.2 | INTEGRATED CIRCUITS | 112 |
| 10.2.1 | RIISING ENERGY DEMAND AND RENEWABLE INITIATIVES TO DRIVE GROWTH | 112 |
| 10.3 | DISCRETE SEMICONDUCTORS | 112 |
| 10.3.1 | OFFER PRECISION, CUSTOMIZATION, AND SCALABILITY | 112 |
| 10.4 | SENSORS | 113 |
| 10.4.1 | INTEGRAL TO INDUSTRIES WHERE REAL-TIME DATA MONITORING AND INTERCONNECTED DEVICES ARE CRITICAL | 113 |
| 10.5 | OPTOELECTRONICS | 113 |
| 10.5.1 | INCREASING ADOPTION OF ENERGY-EFFICIENT AND HIGH-PERFORMANCE TECHNOLOGIES TO DRIVE GROWTH | 113 |
| 10.6 | BATTERY | 114 |
| 10.6.1 | SOLID-STATE BATTERIES OFFERING HIGHER ENERGY DENSITY AND IMPROVED SAFETY OVER LITHIUM-ION | 114 |
| 10.7 | OTHER END-USE INDUSTRIES | 114 |
| 11 | ELECTRONIC CHEMICALS CDMO & CRO MARKET, BY REGION | 115 |
| 11.1 | INTRODUCTION | 116 |
| 11.2 | ASIA PACIFIC | 118 |
| 11.2.1 | CHINA | 126 |
| 11.2.1.1 | Extensive electronics manufacturing capacity to drive growth | 126 |
| 11.2.2 | INDIA | 128 |
| 11.2.2.1 | Localization of semiconductor production to drive market | 128 |
| 11.2.3 | JAPAN | 130 |
| 11.2.3.1 | Focus on revitalizing semiconductor manufacturing to drive growth | 130 |
| 11.2.4 | SOUTH KOREA | 132 |
| 11.2.4.1 | Strong R&D investments and robust demand for advanced materials in electronics industry to drive growth | 132 |
| 11.2.5 | REST OF ASIA PACIFIC | 134 |
| | ? | |
| 11.3 | NORTH AMERICA | 136 |
| 11.3.1 | US | 144 |
| 11.3.1.1 | Growth of semiconductors industry to drive market | 144 |
| 11.3.2 | CANADA | 146 |
| 11.3.2.1 | Growing demand for advanced semiconductor technology to drive market | 146 |
| 11.3.3 | MEXICO | 148 |
| 11.3.3.1 | Strong demand from various electronics applications to drive market | 148 |
| 11.4 | EUROPE | 150 |
| 11.4.1 | GERMANY | 158 |
| 11.4.1.1 | Leadership in European semiconductor production to drive market | 158 |
| 11.4.2 | UK | 160 |
| 11.4.2.1 | Innovation in semiconductor manufacturing and growing demand across automotive and telecommunications industries to drive market | 160 |
| 11.4.3 | FRANCE | 162 |
| 11.4.3.1 | Dynamic growth in electronics and semiconductors industries to drive market | 162 |
| 11.4.4 | ITALY | 164 |
| 11.4.4.1 | Significant investment in electronics and semiconductor production and related strategic partnerships and government initiatives to drive market | 164 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|------------|---|-----|
| 11.4.5 | SPAIN | 166 |
| 11.4.5.1 | PERTE Chip program and other government initiatives for semiconductors industry to drive market | 166 |
| 11.4.6 | REST OF EUROPE | 168 |
| 11.5 | SOUTH AMERICA | 171 |
| 11.5.1 | BRAZIL | 178 |
| 11.5.1.1 | Government incentives and growing adoption of electric vehicles to drive market | 178 |
| 11.5.2 | ARGENTINA | 180 |
| 11.5.2.1 | Industrial development and expanding demand for advanced electronics and semiconductors to drive market | 180 |
| 11.5.3 | REST OF SOUTH AMERICA | 182 |
| 11.6 | MIDDLE EAST & AFRICA | 184 |
| 11.6.1 | GCC COUNTRIES | 190 |
| 11.6.1.1 | Saudi Arabia | 190 |
| 11.6.1.1.1 | Emphasis on semiconductor manufacturing and economic diversification to drive market | 190 |
| 11.6.1.2 | UAE | 192 |
| 11.6.1.2.1 | Government initiatives promoting electronics industry and fostering advancements in R&D to drive market | 192 |
| 11.6.1.3 | Rest of GCC Countries | 194 |
| | ? | |
| 11.6.2 | SOUTH AFRICA | 196 |
| 11.6.2.1 | Growing electrotechnical industry and government-backed industrial policies to drive market | 196 |
| 11.6.3 | REST OF MIDDLE EAST & AFRICA | 198 |
| 12 | COMPETITIVE LANDSCAPE | 201 |
| 12.1 | INTRODUCTION | 201 |
| 12.2 | KEY PLAYER STRATEGIES/RIGHT TO WIN | 201 |
| 12.3 | MARKET SHARE ANALYSIS, 2023 | 203 |
| 12.4 | REVENUE ANALYSIS | 205 |
| 12.5 | BRAND/PRODUCT COMPARATIVE ANALYSIS | 206 |
| 12.6 | COMPANY EVALUATION MATRIX, KEY PLAYERS, 2023 | 207 |
| 12.6.1 | STARS | 207 |
| 12.6.2 | EMERGING LEADERS | 207 |
| 12.6.3 | PERVASIVE PLAYERS | 207 |
| 12.6.4 | PARTICIPANTS | 207 |
| 12.6.5 | COMPANY FOOTPRINT | 209 |
| 12.6.5.1 | Company footprint | 209 |
| 12.6.5.2 | Application footprint | 210 |
| 12.6.5.3 | End-use industry footprint | 210 |
| 12.6.5.4 | Region footprint | 211 |
| 12.7 | COMPANY EVALUATION MATRIX, STARTUPS/SMES, 2023 | 212 |
| 12.7.1 | PROGRESSIVE COMPANIES | 212 |
| 12.7.2 | RESPONSIVE COMPANIES | 212 |
| 12.7.3 | DYNAMIC COMPANIES | 212 |
| 12.7.4 | STARTING BLOCKS | 212 |
| 12.7.5 | COMPETITIVE BENCHMARKING | 214 |
| 12.7.5.1 | List of key startups/SMEs | 214 |
| 12.8 | VALUATION AND FINANCIAL METRICS IN ELECTRONIC CHEMICALS CDMO AND CRO VENDORS | 217 |
| 12.9 | COMPETITIVE SCENARIO | 218 |
| 12.9.1 | PRODUCT LAUNCHES | 218 |
| 12.9.2 | DEALS | 218 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 12.9.3 EXPANSIONS 219
- 12.9.4 OTHERS 221
- ?
- 13 COMPANY PROFILES 224
- 13.1 KEY PLAYERS 224
- 13.1.1 SAJJAN INDIA LTD. 224
- 13.1.1.1 Business overview 224
- 13.1.1.2 Products/Solutions/Services offered 224
- 13.1.1.3 Recent developments 225
- 13.1.1.3.1 Expansions 225
- 13.1.1.3.2 Deals 225
- 13.1.1.4 MnM view 226
- 13.1.1.4.1 Right to win 226
- 13.1.1.4.2 Strategic choices 226
- 13.1.1.4.3 Weaknesses and competitive threats 226
- 13.1.2 COHANCE LIFESCIENCES 227
- 13.1.2.1 Business overview 227
- 13.1.2.2 Products/Solutions/Services offered 227
- 13.1.2.3 Recent developments 228
- 13.1.2.3.1 Deals 228
- 13.1.2.3.2 Others 228
- 13.1.2.4 MnM view 229
- 13.1.2.4.1 Right to win 229
- 13.1.2.4.2 Strategic choices 229
- 13.1.2.4.3 Weaknesses and competitive threats 229
- 13.1.3 NOCTILUCA 230
- 13.1.3.1 Business overview 230
- 13.1.3.2 Products/Solutions/Services offered 231
- 13.1.3.3 Recent developments 231
- 13.1.3.3.1 Product launches 231
- 13.1.3.3.2 Expansions 232
- 13.1.3.3.3 Others 232
- 13.1.3.4 MnM view 232
- 13.1.3.4.1 Right to win 232
- 13.1.3.4.2 Strategic choices 233
- 13.1.3.4.3 Weaknesses and competitive threats 233
- 13.1.4 ACTYLIS 234
- 13.1.4.1 Business overview 234
- 13.1.4.2 Products/Solutions/Services offered 234
- 13.1.4.3 Recent developments 235
- 13.1.4.3.1 Deals 235
- 13.1.4.3.2 Others 235
- 13.1.4.4 MnM view 236
- 13.1.4.4.1 Right to win 236
- 13.1.4.4.2 Strategic choices 236
- 13.1.4.4.3 Weaknesses and competitive threats 236
- 13.1.5 AGC INC. 237

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | | |
|------------|--------------------------------------|-----|
| 13.1.5.1 | Business overview | 237 |
| 13.1.5.2 | Products/Solutions/Services offered | 238 |
| 13.1.5.3 | Recent developments | 239 |
| 13.1.5.3.1 | Product Launches | 239 |
| 13.1.5.3.2 | Expansions | 239 |
| 13.1.5.3.3 | Others | 240 |
| 13.1.5.4 | MnM view | 240 |
| 13.1.5.4.1 | Right to win | 240 |
| 13.1.5.4.2 | Strategic choices | 240 |
| 13.1.5.4.3 | Weaknesses and competitive threats | 241 |
| 13.1.6 | NAVIN FLUORINE INTERNATIONAL LIMITED | 242 |
| 13.1.6.1 | Business overview | 242 |
| 13.1.6.2 | Products/Solutions/Services offered | 243 |
| 13.1.6.3 | Recent developments | 244 |
| 13.1.6.3.1 | Deals | 244 |
| 13.1.6.3.2 | Others | 244 |
| 13.1.6.4 | MnM view | 244 |
| 13.1.6.4.1 | Right to win | 244 |
| 13.1.6.4.2 | Strategic choices | 245 |
| 13.1.6.4.3 | Weaknesses and competitive threats | 245 |
| 13.1.7 | CABB GROUP GMBH | 246 |
| 13.1.7.1 | Business overview | 246 |
| 13.1.7.2 | Products/Solutions/Services offered | 246 |
| 13.1.7.3 | Recent developments | 247 |
| 13.1.7.3.1 | Others | 247 |
| 13.1.7.4 | MnM view | 247 |
| 13.1.7.4.1 | Right to win | 247 |
| 13.1.7.4.2 | Strategic choices | 248 |
| 13.1.7.4.3 | Weaknesses and competitive threats | 248 |
| 13.1.8 | ADESIS INC. | 249 |
| 13.1.8.1 | Business overview | 249 |
| 13.1.8.2 | Products/Solutions/Services offered | 250 |
| 13.1.8.3 | Recent developments | 251 |
| 13.1.8.3.1 | Expansions | 251 |
| 13.1.8.3.2 | Others | 251 |
| 13.1.8.4 | MnM view | 252 |
| 13.1.8.4.1 | Right to win | 252 |
| 13.1.8.4.2 | Strategic choices | 252 |
| 13.1.8.4.3 | Weaknesses and competitive threats | 252 |
| ? | | |
| 13.1.9 | INVENTYS RESEARCH COMPANY | 253 |
| 13.1.9.1 | Business overview | 253 |
| 13.1.9.2 | Products/Solutions/Services offered | 253 |
| 13.1.9.3 | Recent developments | 254 |
| 13.1.9.3.1 | Expansions | 254 |
| 13.1.9.3.2 | Others | 254 |
| 13.1.9.4 | MnM view | 254 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.9.4.1 Right to win 254
- 13.1.9.4.2 Strategic choices 254
- 13.1.9.4.3 Weaknesses and competitive threats 255
- 13.1.10 LINKCHEM TECHNOLOGY CO., LTD. 256
- 13.1.10.1 Business overview 256
- 13.1.10.2 Products/Solutions/Services offered 256
- 13.1.10.3 Recent developments 257
- 13.1.10.3.1 Others 257
- 13.1.10.4 MnM view 257
- 13.1.10.4.1 Right to win 257
- 13.1.10.4.2 Strategic choices 257
- 13.1.10.4.3 Weaknesses and competitive threats 258
- 13.2 OTHER PLAYERS 259
- 13.2.1 SSK BIOSCIENCES PVT. LTD. 259
- 13.2.2 CHONGQING WERLCHEM NEW MATERIALS TECHNOLOGY CO., LTD 260
- 13.2.3 VIAKEM 261
- 13.2.4 INNOVASSYNTH 261
- 13.2.5 PHT INDUSTRIES 262
- 13.2.6 SYMPHARMA 262
- 13.2.7 VIRUJ GROUP 263
- 13.2.8 REDOX SCIENTIFIC 264
- 13.2.9 SUNGWUN PHARMACOPIA CO., LTD. 265
- 13.2.10 KNC LABORATORIES CO., LTD. 266
- 14 APPENDIX 267
- 14.1 DISCUSSION GUIDE 267
- 14.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL 270
- 14.3 CUSTOMIZATION OPTIONS 272
- 14.4 RELATED REPORTS 272
- 14.5 AUTHOR DETAILS 273

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Electronic Chemicals CDMO & CRO Market by Type (High Performance Polymers, Acid & Base Chemicals, Gases, Metals & Pastes), Scale, Application (Photoresist, Etchants, Dopants, Cleaning, Deposition), End-Use & Region-Global Forecast to 2029

Market Report | 2024-12-12 | 274 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|-------------------------|------------|
| | Single User | \$4950.00 |
| | Multi User | \$6650.00 |
| | Corporate License | \$8150.00 |
| | Enterprise Site License | \$10000.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|----------------------|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2026-03-05

Signature

A large, empty rectangular box intended for a signature.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com