

Survey of Electronic Hydrogen Fluoride in China

The First Edition

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1. Introduction

The report provides you with detailed information of electronic hydrogen fluoride industry in China, including major manufacturers, capacity, price analysis, export analysis, supply and demand, future forecasts and so on.

2. Approach in this report

The research for the report is carried out by the following steps:

Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work went into compiling and analysing the information obtained. Necessary checks were made with the Chinese suppliers regarding market information such as production, demand, use, competition, etc.

Telephone interviews

CCM has carried out extensive telephone interviews in order to track the actual market situation of the electronic hydrogen fluoride industry in China.

Interviewees cover:

- Key producers
- Key end users
- Key traders
- Material suppliers
- Some associations
- Experts

Site visit

CCM has visited some industry experts in order to obtain the experts' thorough views and investment suggestion.

Network

CCM adopts network to contact with players in this industry by B2B website and software.

Data processing and presentation

The data collecting and compiling are sourced from:

- Published articles from Chinese periodicals, magazines, journals, the third-party database
- Government statistics & customs statistics
- Telephone interviews with Chinese producers, traders and governments
- Comments from industrial experts
- CCM's database
- Professional database in other sources
- Information from internet

The data from various ways have been combined to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions took place in order to analyse the data and draw conclusions from it.

3. Executive summary

Electronic hydrogen fluoride is one of the indispensable and key materials in the production process of solar panel, flat panel display and semiconductor. In general, China's electronic hydrogen fluoride industry started late but has developed fast.

With rapid development of China's photovoltaic industry, and gradual transfer of global semiconductor manufacturing capacity to Asia, surging demand brought by these new markets has driven quick expansion of the electronic hydrogen fluoride industry in China. At present, domestic capacity is mainly concentrated on low- and medium-end products. High-end products still highly rely on import.

In 2020, there were XXX active electronic hydrogen fluoride manufacturers in China; their total capacity and output reached XXX t/a and XXX tonnes respectively. Affected by the COVID-19 pandemic, the ex-works price of electronic hydrogen fluoride followed a general downward path; the annual average ex-works price stood at XXX.

Japan's export control over some key materials to South Korea has provided opportunities for China's electronic hydrogen fluoride exports. The export volume increased from XXX tonnes in 2018 to XXX tonnes in 2020, with a CAGR of XXX. The annual average export price of electronic hydrogen fluoride was XXX in 2020.

At present, electronic hydrogen fluoride is XXX in China. Driven by strong market demand, many companies have plans to expand or build new production lines. Some existing players propose to upgrade their capacity for products used in semiconductor and flat panel display. It is estimated that the capacity of electronic hydrogen fluoride will at least XXX in the next five years.

In the future, with continuous policy support, larger downstream capacity in China, electronic hydrogen fluoride industry will enjoy broader development space, especially for the high-end products.

4. What is in the report

Note: Key data/information in this sample page is hidden, while in the report it is not.

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2 Production situation of electronic hydrogen fluoride in China

2.1 Producers of electronic hydrogen fluoride in China

In 2020, there were XXX active electronic hydrogen fluoride producers in China. Jiangsu hosts the largest number of manufacturers, followed by Zhejiang and Fujian.

Table 2.1-1 Electronic hydrogen fluoride producers in China, 2020

No.	Producer	Location	Status
1	Do-Fluoride Chemicals Co., Ltd.	Henan	Active
2	Solvay Lantian (Quzhou) Chemicals Co., Ltd.	Zhejiang	Active
3	Fujian Shaowu Yongfei Chemical Co., Ltd.	Fujian	Active
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2.2 Capacity and output of electronic hydrogen fluoride

In 2020, the capacity and output of electronic hydrogen fluoride were about XXX t/a and XXX tonnes respectively.

Since electronic hydrogen fluoride for semiconductors has very strict requirements on the content of metal impurities, the entry barrier is very high, and the production technology is extremely difficult. As of 2020, XXX manufacturers in China can produce Grade 4 electronic hydrogen fluoride.

Table 2.2-1 Capacity and output of electronic hydrogen fluoride producers in China, 2020

No.	Producer	Capacity, t/a				Output, tonne			
		Total	G4-G5	G3	G1-G2	Total	G4-G5	G3	G1-G2
1	Do-Fluoride Chemicals Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	Kunshan Fuller Chemical Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...
...
...
ToTal		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

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2.3 Price of electronic hydrogen fluoride

In 2020, the average monthly ex-works price of electronic hydrogen fluoride fluctuated, but followed a general downward path.

Figure 2.3-1 Monthly average ex-works price of electronic hydrogen fluoride in China, Jan. 2020–Dec. 2020



Note: The price difference between adjacent grades of electronic hydrogen fluoride is about USD144/t.

Source: CCM

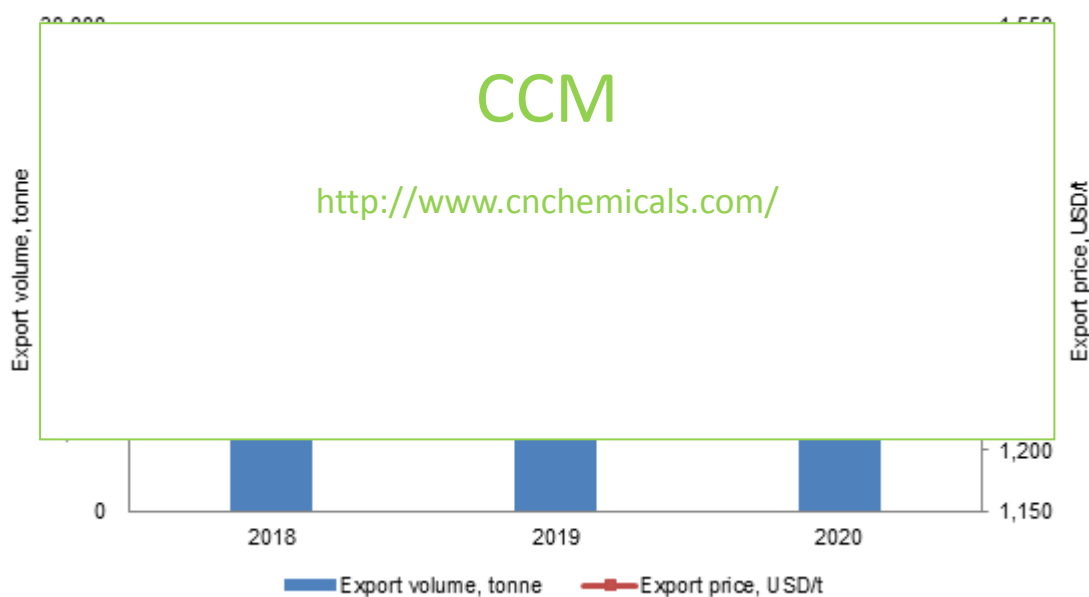
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3 Export analysis of electronic hydrogen fluoride 2018–2020

3.1 Overall situation of electronic hydrogen fluoride trading

According to data from China Customs, from 2018 to 2020, annual export volume of electronic hydrogen fluoride was XXX tonnes, XXX tonnes, and XXX tonnes respectively, with an average annual growth rate of more than XXX, and the average export price was XXX, XXX and XXX respectively.

Figure 3.1-1 China’s annual export volume and average price of electronic hydrogen fluoride, 2018–2020

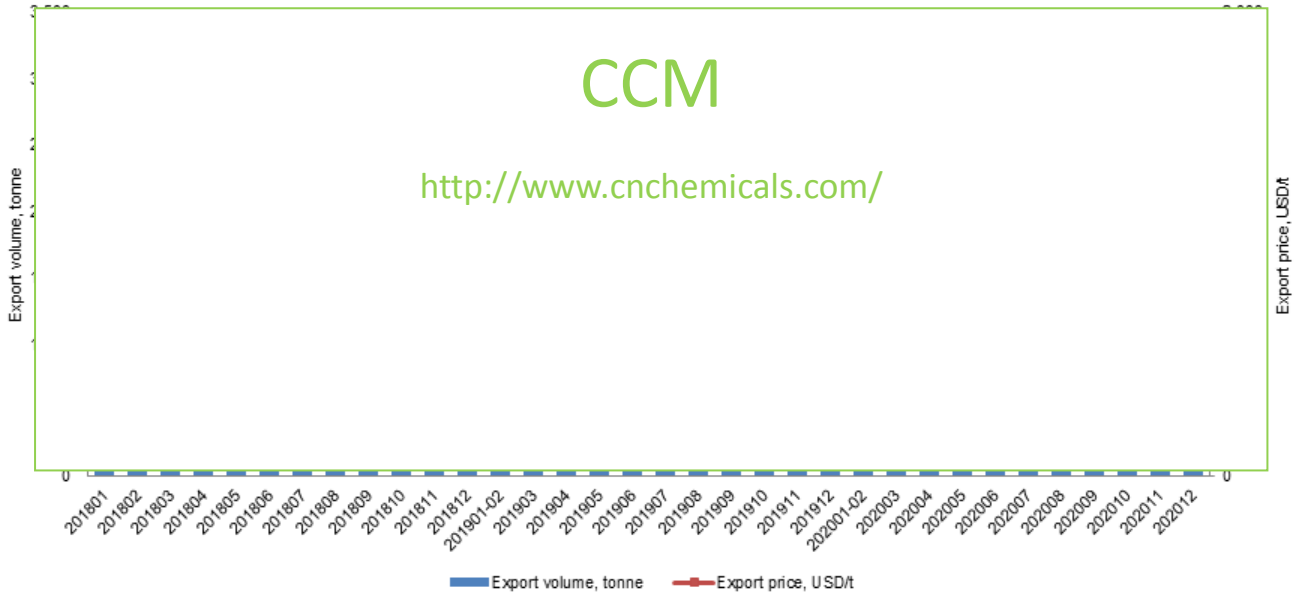


Source: CCM & China Customs

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3.2 Export analysis of electronic hydrogen fluoride

Figure 3.2-1 Monthly export volume and price of electronic hydrogen fluoride in China, Jan. 2018–Dec. 2020



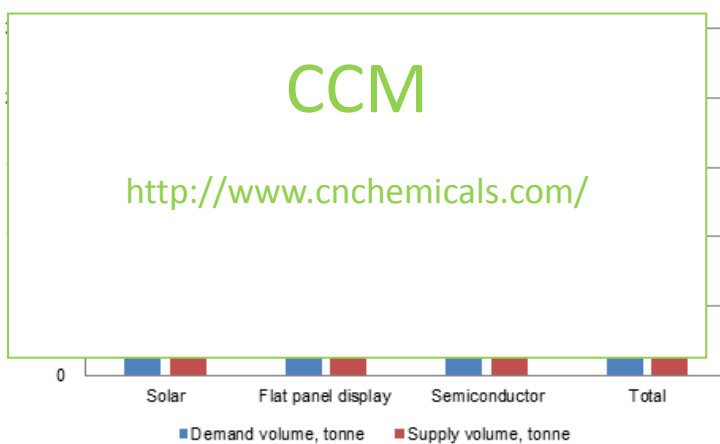
Source: CCM

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4 Demand and supply of electronic hydrogen fluoride in China

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Figure 4-1 Demand and supply of electronic hydrogen fluoride in China, 2020



Source: CCM & China Electronics Materials Industry Association

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If you want more information, please feel free to contact us

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