

# Global Semiconductor PI Film Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Semiconductor PI Film competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Semiconductor PI Film, or Polyimide Film for Semiconductor Applications, is a high-performance polymer material tailored for the semiconductor industry, distinguished by its unique manufacturing processes, material properties, and application-oriented classifications. It is typically produced through processes such as solution casting or chemical vapor deposition (CVD). For solution casting, polyimide precursors are coated onto a substrate and then undergo high-temperature curing to form a film; CVD, on the other hand, enables the formation of thin films with exceptional uniformity on wafer surfaces. Structurally, it can be categorized into non-photosensitive and photosensitive types. The latter, known as PSPI Film, integrates photosensitive groups, allowing for the direct formation of precise patterns via photolithography—a critical capability for advanced semiconductor packaging. In 2024, the global production of semiconductor PI film will reach 84,300 tons, with an average selling price of US\$28,500 per ton. Market Drivers: Synergy of Industry Growth, Technological Evolution, and Policy Support. Booming Semiconductor Industry and Expanding Application Scope. The global semiconductor industry's rapid expansion, fueled by surging demand for electronic products, has directly boosted the need for semiconductor PI Film. As a critical material in chip manufacturing and packaging, it is widely used in processes such as wafer protection, interlayer insulation, and packaging buffering. The rise of emerging fields like flexible electronics, wearable devices, and new energy vehicle electronics has further broadened its application landscape. For instance, flexible displays and automotive semiconductor modules rely heavily on its flexibility and thermal stability, driving sustained market growth. Technological

**Advancements and Escalating Process Requirements**Continuous advancements in semiconductor processes, particularly the shift toward finer feature sizes and more complex packaging architectures (e.g., Chiplet and HBM), have raised the bar for material performance. Semiconductor PI Film's ability to meet stringent requirements—such as ultra-thin film uniformity, high-temperature resistance, and precise patternability—has made it indispensable. Innovations like photosensitive PI Film have simplified the photolithography process in advanced packaging, enhancing production efficiency and enabling the miniaturization of semiconductor devices, thus becoming a key driver of market demand.

**Policy Support and Localization**TrendsGovernments worldwide recognize semiconductors as a strategic industry and have rolled out supportive policies, including subsidies for R&D and incentives for local production. These policies encourage enterprises to invest in the development of high-performance materials like semiconductor PI Film, fostering a favorable environment for technological breakthroughs and industrial growth. In regions with strong electronics manufacturing sectors, there is a growing push for supply chain localization, driving demand for domestically produced semiconductor PI Film to reduce reliance on imports.

**Miniaturization and Diversification of Electronic Products**Consumer demand for smaller, lighter, and more versatile electronic devices—such as foldable smartphones and wearable tech—has spurred innovation in semiconductor packaging and materials. Semiconductor PI Film, with its thinness, flexibility, and processability, is well-suited to the miniaturization trend. It enables the development of compact, high-performance semiconductor components, making it a preferred material for manufacturers aiming to meet evolving consumer needs.

**Market Challenges: Barriers Across Technology, Competition, and Supply Chains**High Technical Barriers and Patent MonopoliesThe production of semiconductor PI Film involves complex processes, from raw material formulation to film formation and post-treatment, requiring precise control over parameters like thickness uniformity and thermal stability. Key technologies, particularly for high-end products such as ultra-thin PI Film and PSPI Film, are dominated by international giants from the United States, Japan, and South Korea. These companies hold thousands of patents covering raw materials, processes, and applications, creating significant obstacles for new entrants and domestic manufacturers seeking technological breakthroughs. Additionally, the high cost of R&D and specialized equipment further limits the ability of smaller enterprises to compete technologically.

**Intense Market Competition and Import Dependence**The global semiconductor PI Film market is characterized by an oligopolistic structure, with international players capturing a large share of the high-end market through technological advantages and brand recognition. Domestic manufacturers, while making progress, still lag behind in terms of product performance—such as heat resistance and dielectric properties—and market share. High-end products, especially those with

thicknesses below 10µm, remain heavily reliant on imports, putting domestic enterprises at a disadvantage in competing for high-value-added market segments.

**Volatile Raw Material Prices and Supply Chain Risks**The production of semiconductor PI Film relies on specialized raw materials, such as certain dianhydrides and diamines. The prices of these raw materials are subject to fluctuations in the global energy market and trade policies, directly impacting production costs. Moreover, the supply of high-purity raw materials is concentrated among a small number of international suppliers, leading to supply chain vulnerabilities. Domestic shortages of some key raw materials further increase production costs and supply uncertainties for local manufacturers.

**Environmental Pressures and Compliance Challenges**Increasing global environmental awareness has led to stricter regulations on the semiconductor industry's environmental impact. The production of semiconductor PI Film may generate hazardous by-products, requiring enterprises to invest in advanced environmental protection technologies and equipment to meet emission standards, adding to production costs. Additionally, varying regulatory requirements for semiconductor materials across different countries and regions necessitate compliance with multiple certification standards for market entry, increasing the complexity and cost of global market expansion.

**Threats from Substitute Materials and Technological Disruption**While semiconductor PI Film is widely used, it faces competition from alternative materials. For example, certain high-performance polymer films and ceramic materials offer advantages in specific properties like ultra-high barrier performance, potentially diverting demand in niche high-end applications. Furthermore, ongoing innovations in semiconductor packaging technologies and materials, such as the development of bio-based polymers and new insulating materials, could pose long-term threats if they achieve breakthroughs in cost and performance, challenging the market position of traditional semiconductor PI Film.

The global Semiconductor PI Film market size was estimated at USD 2402.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 10.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Semiconductor PI Film market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market

positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Semiconductor PI Film market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Semiconductor PI Film market.

### **Global Semiconductor PI Film Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

DuPont

Kaneka

PI Advanced Materials

Ube Industries

Taimide Tech

Rayitek

Guilin Electrical Equipment Scientific Research Institute

Zhuzhou Times New Material Technology

Wuxi Gao Tuo

ZTT

Shandong Wanda Microelectronics  
Shenzhen Danbond Technology

## **Market Segmentation (by Type)**

Film Thickness

## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

#### 1.1 Market Definition and Statistical Scope of Semiconductor PI Film

#### 1.2 Key Market Segments

##### 1.2.1 Semiconductor PI Film Segment by Type

##### 1.2.2 Semiconductor PI Film Segment by Application

#### 1.3 Methodology & Sources of Information

##### 1.3.1 Research Methodology

##### 1.3.2 Research Process

##### 1.3.3 Market Breakdown and Data Triangulation

##### 1.3.4 Base Year

##### 1.3.5 Report Assumptions & Caveats

### **2 SEMICONDUCTOR PI FILM MARKET OVERVIEW**

#### 2.1 Global Market Overview

##### 2.1.1 Global Semiconductor PI Film Market Size (M USD) Estimates and Forecasts (2020-2035)

##### 2.1.2 Global Semiconductor PI Film Sales Estimates and Forecasts (2020-2035)

#### 2.2 Market Segment Executive Summary

#### 2.3 Global Market Size by Region

### **3 SEMICONDUCTOR PI FILM MARKET COMPETITIVE LANDSCAPE**

#### 3.1 Company Assessment Quadrant

#### 3.2 Global Semiconductor PI Film Product Life Cycle

#### 3.3 Global Semiconductor PI Film Sales by Manufacturers (2020-2025)

#### 3.4 Global Semiconductor PI Film Revenue Market Share by Manufacturers (2020-2025)

#### 3.5 Semiconductor PI Film Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

#### 3.6 Global Semiconductor PI Film Average Price by Manufacturers (2020-2025)

#### 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

#### 3.8 Semiconductor PI Film Market Competitive Situation and Trends

##### 3.8.1 Semiconductor PI Film Market Concentration Rate

##### 3.8.2 Global 5 and 10 Largest Semiconductor PI Film Players Market Share by Revenue

##### 3.8.3 Mergers & Acquisitions, Expansion

## **4 SEMICONDUCTOR PI FILM INDUSTRY CHAIN ANALYSIS**

- 4.1 Semiconductor PI Film Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF SEMICONDUCTOR PI FILM MARKET**

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
  - 5.4.1 New Product Developments
  - 5.4.2 Mergers & Acquisitions
  - 5.4.3 Expansions
  - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
  - 5.5.1 Industry Policies Analysis
  - 5.5.2 Economic Environment Analysis
  - 5.5.3 Social Environment Analysis
  - 5.5.4 Technological Environment Analysis
- 5.6 Global Semiconductor PI Film Market Porter's Five Forces Analysis
  - 5.6.1 Global Trade Frictions
  - 5.6.2 U.S. Tariff Policy ? April 2025
  - 5.6.3 Global Trade Frictions and Their Impacts to Semiconductor PI Film Market
- 5.7 ESG Ratings of Leading Companies

## **6 SEMICONDUCTOR PI FILM MARKET SEGMENTATION BY TYPE**

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Semiconductor PI Film Sales Market Share by Type (2020-2025)
- 6.3 Global Semiconductor PI Film Market Size by Type (2020-2025)
- 6.4 Global Semiconductor PI Film Price by Type (2020-2025)

## **7 SEMICONDUCTOR PI FILM MARKET SEGMENTATION BY APPLICATION**

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)

- 7.2 Global Semiconductor PI Film Market Sales by Application (2020-2025)
- 7.3 Global Semiconductor PI Film Market Size (M USD) by Application (2020-2025)
- 7.4 Global Semiconductor PI Film Sales Growth Rate by Application (2020-2025)

## **8 SEMICONDUCTOR PI FILM MARKET SALES BY REGION**

- 8.1 Global Semiconductor PI Film Sales by Region
  - 8.1.1 Global Semiconductor PI Film Sales by Region
  - 8.1.2 Global Semiconductor PI Film Sales Market Share by Region
- 8.2 Global Semiconductor PI Film Market Size by Region
  - 8.2.1 Global Semiconductor PI Film Market Size by Region
  - 8.2.2 Global Semiconductor PI Film Market Size by Region
- 8.3 North America
  - 8.3.1 North America Semiconductor PI Film Sales by Country
  - 8.3.2 North America Semiconductor PI Film Market Size by Country
  - 8.3.3 U.S. Market Overview
  - 8.3.4 Canada Market Overview
  - 8.3.5 Mexico Market Overview
- 8.4 Europe
  - 8.4.1 Europe Semiconductor PI Film Sales by Country
  - 8.4.2 Europe Semiconductor PI Film Market Size by Country
  - 8.4.3 Germany Market Overview
  - 8.4.4 France Market Overview
  - 8.4.5 U.K. Market Overview
  - 8.4.6 Italy Market Overview
  - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
  - 8.5.1 Asia Pacific Semiconductor PI Film Sales by Region
  - 8.5.2 Asia Pacific Semiconductor PI Film Market Size by Region
  - 8.5.3 China Market Overview
  - 8.5.4 Japan Market Overview
  - 8.5.5 South Korea Market Overview
  - 8.5.6 India Market Overview
  - 8.5.7 Southeast Asia Market Overview
- 8.6 South America
  - 8.6.1 South America Semiconductor PI Film Sales by Country
  - 8.6.2 South America Semiconductor PI Film Market Size by Country
  - 8.6.3 Brazil Market Overview
  - 8.6.4 Argentina Market Overview

#### 8.6.5 Columbia Market Overview

### 8.7 Middle East and Africa

#### 8.7.1 Middle East and Africa Semiconductor PI Film Sales by Region

#### 8.7.2 Middle East and Africa Semiconductor PI Film Market Size by Region

#### 8.7.3 Saudi Arabia Market Overview

#### 8.7.4 UAE Market Overview

#### 8.7.5 Egypt Market Overview

#### 8.7.6 Nigeria Market Overview

#### 8.7.7 South Africa Market Overview

## 9 SEMICONDUCTOR PI FILM MARKET PRODUCTION BY REGION

### 9.1 Global Production of Semiconductor PI Film by Region(2020-2025)

### 9.2 Global Semiconductor PI Film Revenue Market Share by Region (2020-2025)

### 9.3 Global Semiconductor PI Film Production, Revenue, Price and Gross Margin (2020-2025)

### 9.4 North America Semiconductor PI Film Production

#### 9.4.1 North America Semiconductor PI Film Production Growth Rate (2020-2025)

#### 9.4.2 North America Semiconductor PI Film Production, Revenue, Price and Gross Margin (2020-2025)

### 9.5 Europe Semiconductor PI Film Production

#### 9.5.1 Europe Semiconductor PI Film Production Growth Rate (2020-2025)

#### 9.5.2 Europe Semiconductor PI Film Production, Revenue, Price and Gross Margin (2020-2025)

### 9.6 Japan Semiconductor PI Film Production (2020-2025)

#### 9.6.1 Japan Semiconductor PI Film Production Growth Rate (2020-2025)

#### 9.6.2 Japan Semiconductor PI Film Production, Revenue, Price and Gross Margin (2020-2025)

### 9.7 China Semiconductor PI Film Production (2020-2025)

#### 9.7.1 China Semiconductor PI Film Production Growth Rate (2020-2025)

#### 9.7.2 China Semiconductor PI Film Production, Revenue, Price and Gross Margin (2020-2025)

## 10 KEY COMPANIES PROFILE

### 10.1 DuPont

#### 10.1.1 DuPont Basic Information

#### 10.1.2 DuPont Semiconductor PI Film Product Overview

#### 10.1.3 DuPont Semiconductor PI Film Product Market Performance

- 10.1.4 DuPont Business Overview
- 10.1.5 DuPont SWOT Analysis
- 10.1.6 DuPont Recent Developments
- 10.2 Kaneka
  - 10.2.1 Kaneka Basic Information
  - 10.2.2 Kaneka Semiconductor PI Film Product Overview
  - 10.2.3 Kaneka Semiconductor PI Film Product Market Performance
  - 10.2.4 Kaneka Business Overview
  - 10.2.5 Kaneka SWOT Analysis
  - 10.2.6 Kaneka Recent Developments
- 10.3 PI Advanced Materials
  - 10.3.1 PI Advanced Materials Basic Information
  - 10.3.2 PI Advanced Materials Semiconductor PI Film Product Overview
  - 10.3.3 PI Advanced Materials Semiconductor PI Film Product Market Performance
  - 10.3.4 PI Advanced Materials Business Overview
  - 10.3.5 PI Advanced Materials SWOT Analysis
  - 10.3.6 PI Advanced Materials Recent Developments
- 10.4 Ube Industries
  - 10.4.1 Ube Industries Basic Information
  - 10.4.2 Ube Industries Semiconductor PI Film Product Overview
  - 10.4.3 Ube Industries Semiconductor PI Film Product Market Performance
  - 10.4.4 Ube Industries Business Overview
  - 10.4.5 Ube Industries Recent Developments
- 10.5 Taimide Tech
  - 10.5.1 Taimide Tech Basic Information
  - 10.5.2 Taimide Tech Semiconductor PI Film Product Overview
  - 10.5.3 Taimide Tech Semiconductor PI Film Product Market Performance
  - 10.5.4 Taimide Tech Business Overview
  - 10.5.5 Taimide Tech Recent Developments
- 10.6 Rayitek
  - 10.6.1 Rayitek Basic Information
  - 10.6.2 Rayitek Semiconductor PI Film Product Overview
  - 10.6.3 Rayitek Semiconductor PI Film Product Market Performance
  - 10.6.4 Rayitek Business Overview
  - 10.6.5 Rayitek Recent Developments
- 10.7 Guilin Electrical Equipment Scientific Research Institute
  - 10.7.1 Guilin Electrical Equipment Scientific Research Institute Basic Information
  - 10.7.2 Guilin Electrical Equipment Scientific Research Institute Semiconductor PI Film Product Overview

10.7.3 Guilin Electrical Equipment Scientific Research Institute Semiconductor PI Film Product Market Performance

10.7.4 Guilin Electrical Equipment Scientific Research Institute Business Overview

10.7.5 Guilin Electrical Equipment Scientific Research Institute Recent Developments

10.8 Zhuzhou Times New Material Technology

10.8.1 Zhuzhou Times New Material Technology Basic Information

10.8.2 Zhuzhou Times New Material Technology Semiconductor PI Film Product Overview

10.8.3 Zhuzhou Times New Material Technology Semiconductor PI Film Product Market Performance

10.8.4 Zhuzhou Times New Material Technology Business Overview

10.8.5 Zhuzhou Times New Material Technology Recent Developments

10.9 Wuxi Gao Tuo

10.9.1 Wuxi Gao Tuo Basic Information

10.9.2 Wuxi Gao Tuo Semiconductor PI Film Product Overview

10.9.3 Wuxi Gao Tuo Semiconductor PI Film Product Market Performance

10.9.4 Wuxi Gao Tuo Business Overview

10.9.5 Wuxi Gao Tuo Recent Developments

10.10 ZTT

10.10.1 ZTT Basic Information

10.10.2 ZTT Semiconductor PI Film Product Overview

10.10.3 ZTT Semiconductor PI Film Product Market Performance

10.10.4 ZTT Business Overview

10.10.5 ZTT Recent Developments

10.11 Shandong Wanda Microelectronics

10.11.1 Shandong Wanda Microelectronics Basic Information

10.11.2 Shandong Wanda Microelectronics Semiconductor PI Film Product Overview

10.11.3 Shandong Wanda Microelectronics Semiconductor PI Film Product Market Performance

10.11.4 Shandong Wanda Microelectronics Business Overview

10.11.5 Shandong Wanda Microelectronics Recent Developments

10.12 Shenzhen Danbond Technology

10.12.1 Shenzhen Danbond Technology Basic Information

10.12.2 Shenzhen Danbond Technology Semiconductor PI Film Product Overview

10.12.3 Shenzhen Danbond Technology Semiconductor PI Film Product Market Performance

10.12.4 Shenzhen Danbond Technology Business Overview

10.12.5 Shenzhen Danbond Technology Recent Developments

## **11 SEMICONDUCTOR PI FILM MARKET FORECAST BY REGION**

11.1 Global Semiconductor PI Film Market Size Forecast

11.2 Global Semiconductor PI Film Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Semiconductor PI Film Market Size Forecast by Country

11.2.3 Asia Pacific Semiconductor PI Film Market Size Forecast by Region

11.2.4 South America Semiconductor PI Film Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Semiconductor PI Film by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

12.1 Global Semiconductor PI Film Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Semiconductor PI Film by Type (2026-2035)

12.1.2 Global Semiconductor PI Film Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Semiconductor PI Film by Type (2026-2035)

12.2 Global Semiconductor PI Film Market Forecast by Application (2026-2035)

12.2.1 Global Semiconductor PI Film Sales (K MT) Forecast by Application

12.2.2 Global Semiconductor PI Film Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Semiconductor PI Film Market Size by Type (M USD)

Table 4. Global Semiconductor PI Film Market Size by Application

Table 5. Semiconductor PI Film Market Size Comparison by Region (M USD)

Table 6. Global Semiconductor PI Film Sales (K MT) by Manufacturers (2020-2025)

Table 7. Global Semiconductor PI Film Sales Market Share by Manufacturers (2020-2025)

Table 8. Global Semiconductor PI Film Revenue (M USD) by Manufacturers (2020-2025)

Table 9. Global Semiconductor PI Film Revenue Share by Manufacturers (2020-2025)

Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Semiconductor PI Film as of 2025)

Table 11. Global Market Semiconductor PI Film Average Price (USD/KG) of Key Manufacturers (2020-2025)

Table 12. Manufacturers? Manufacturing Sites, Areas Served

Table 13. Manufacturers? Product Type

Table 14. Global Semiconductor PI Film Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 15. Mergers & Acquisitions, Expansion Plans

Table 16. Market Overview of Key Raw Materials

Table 17. Midstream Market Analysis

Table 18. Downstream Customer Analysis

Table 19. Key Development Trends

Table 20. Driving Factors

Table 21. Semiconductor PI Film Market Challenges

Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 26. Global Semiconductor PI Film Sales by Type (K MT)

Table 27. Global Semiconductor PI Film Market Size by Type (M USD)

Table 28. Global Semiconductor PI Film Sales (K MT) by Type (2020-2025)

Table 29. Global Semiconductor PI Film Sales Market Share by Type (2020-2025)

|                                                                                                                               |
|-------------------------------------------------------------------------------------------------------------------------------|
| Table 30. Global Semiconductor PI Film Market Size (M USD) by Type (2020-2025)                                                |
| Table 31. Global Semiconductor PI Film Market Share by Type (2020-2025)                                                       |
| Table 32. Global Semiconductor PI Film Price (USD/KG) by Type (2020-2025)                                                     |
| Table 33. Global Semiconductor PI Film Sales (K MT) by Application                                                            |
| Table 34. Global Semiconductor PI Film Market Size by Application                                                             |
| Table 35. Global Semiconductor PI Film Sales by Application (2020-2025) & (K MT)                                              |
| Table 36. Global Semiconductor PI Film Sales Market Share by Application (2020-2025)                                          |
| Table 37. Global Semiconductor PI Film Market Size by Application (2020-2025) & (M USD)                                       |
| Table 38. Global Semiconductor PI Film Market Share by Application (2020-2025)                                                |
| Table 39. Global Semiconductor PI Film Sales Growth Rate by Application (2020-2025)                                           |
| Table 40. Global Semiconductor PI Film Sales by Region (2020-2025) & (K MT)                                                   |
| Table 41. Global Semiconductor PI Film Sales Market Share by Region (2020-2025)                                               |
| Table 42. Global Semiconductor PI Film Market Size by Region (2020-2025) & (M USD)                                            |
| Table 43. Global Semiconductor PI Film Market Size by Region (2020-2025)                                                      |
| Table 44. North America Semiconductor PI Film Sales by Country (2020-2025) & (K MT)                                           |
| Table 45. North America Semiconductor PI Film Market Size by Country (2020-2025) & (M USD)                                    |
| Table 46. Europe Semiconductor PI Film Sales by Country (2020-2025) & (K MT)                                                  |
| Table 47. Europe Semiconductor PI Film Market Size by Country (2020-2025) & (M USD)                                           |
| Table 48. Asia Pacific Semiconductor PI Film Sales by Region (2020-2025) & (K MT)                                             |
| Table 49. Asia Pacific Semiconductor PI Film Market Size by Region (2020-2025) & (M USD)                                      |
| Table 50. South America Semiconductor PI Film Sales by Country (2020-2025) & (K MT)                                           |
| Table 51. South America Semiconductor PI Film Market Size by Country (2020-2025) & (M USD)                                    |
| Table 52. Middle East and Africa Semiconductor PI Film Sales by Region (2020-2025) & (K MT)                                   |
| Table 53. Middle East and Africa Semiconductor PI Film Market Size by Region (2020-2025) & (M USD)                            |
| Table 54. Global Semiconductor PI Film Production (K MT) by Region(2020-2025)                                                 |
| Table 55. Global Semiconductor PI Film Revenue (US\$ Million) by Region (2020-2025)                                           |
| Table 56. Global Semiconductor PI Film Revenue Market Share by Region (2020-2025)                                             |
| Table 57. Global Semiconductor PI Film Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025) |
| Table 58. North America Semiconductor PI Film Production (K MT), Revenue (US\$                                                |

Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 59. Europe Semiconductor PI Film Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 60. Japan Semiconductor PI Film Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 61. China Semiconductor PI Film Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 62. DuPont Basic Information

Table 63. DuPont Semiconductor PI Film Product Overview

Table 64. DuPont Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. DuPont Business Overview

Table 66. DuPont SWOT Analysis

Table 67. DuPont Recent Developments

Table 68. Kaneka Basic Information

Table 69. Kaneka Semiconductor PI Film Product Overview

Table 70. Kaneka Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. Kaneka Business Overview

Table 72. Kaneka SWOT Analysis

Table 73. Kaneka Recent Developments

Table 74. PI Advanced Materials Basic Information

Table 75. PI Advanced Materials Semiconductor PI Film Product Overview

Table 76. PI Advanced Materials Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 77. PI Advanced Materials Business Overview

Table 78. PI Advanced Materials SWOT Analysis

Table 79. PI Advanced Materials Recent Developments

Table 80. Ube Industries Basic Information

Table 81. Ube Industries Semiconductor PI Film Product Overview

Table 82. Ube Industries Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 83. Ube Industries Business Overview

Table 84. Ube Industries Recent Developments

Table 85. Taimide Tech Basic Information

Table 86. Taimide Tech Semiconductor PI Film Product Overview

Table 87. Taimide Tech Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 88. Taimide Tech Business Overview

|                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table 89. Taimide Tech Recent Developments                                                                                                                           |
| Table 90. Rayitek Basic Information                                                                                                                                  |
| Table 91. Rayitek Semiconductor PI Film Product Overview                                                                                                             |
| Table 92. Rayitek Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)                                                   |
| Table 93. Rayitek Business Overview                                                                                                                                  |
| Table 94. Rayitek Recent Developments                                                                                                                                |
| Table 95. Guilin Electrical Equipment Scientific Research Institute Basic Information                                                                                |
| Table 96. Guilin Electrical Equipment Scientific Research Institute Semiconductor PI Film Product Overview                                                           |
| Table 97. Guilin Electrical Equipment Scientific Research Institute Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025) |
| Table 98. Guilin Electrical Equipment Scientific Research Institute Business Overview                                                                                |
| Table 99. Guilin Electrical Equipment Scientific Research Institute Recent Developments                                                                              |
| Table 100. Zhuzhou Times New Material Technology Basic Information                                                                                                   |
| Table 101. Zhuzhou Times New Material Technology Semiconductor PI Film Product Overview                                                                              |
| Table 102. Zhuzhou Times New Material Technology Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)                    |
| Table 103. Zhuzhou Times New Material Technology Business Overview                                                                                                   |
| Table 104. Zhuzhou Times New Material Technology Recent Developments                                                                                                 |
| Table 105. Wuxi Gao Tuo Basic Information                                                                                                                            |
| Table 106. Wuxi Gao Tuo Semiconductor PI Film Product Overview                                                                                                       |
| Table 107. Wuxi Gao Tuo Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)                                             |
| Table 108. Wuxi Gao Tuo Business Overview                                                                                                                            |
| Table 109. Wuxi Gao Tuo Recent Developments                                                                                                                          |
| Table 110. ZTT Basic Information                                                                                                                                     |
| Table 111. ZTT Semiconductor PI Film Product Overview                                                                                                                |
| Table 112. ZTT Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)                                                      |
| Table 113. ZTT Business Overview                                                                                                                                     |
| Table 114. ZTT Recent Developments                                                                                                                                   |
| Table 115. Shandong Wanda Microelectronics Basic Information                                                                                                         |
| Table 116. Shandong Wanda Microelectronics Semiconductor PI Film Product Overview                                                                                    |
| Table 117. Shandong Wanda Microelectronics Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)                          |

|                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------|
| Table 118. Shandong Wanda Microelectronics Business Overview                                                                            |
| Table 119. Shandong Wanda Microelectronics Recent Developments                                                                          |
| Table 120. Shenzhen Danbond Technology Basic Information                                                                                |
| Table 121. Shenzhen Danbond Technology Semiconductor PI Film Product Overview                                                           |
| Table 122. Shenzhen Danbond Technology Semiconductor PI Film Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025) |
| Table 123. Shenzhen Danbond Technology Business Overview                                                                                |
| Table 124. Shenzhen Danbond Technology Recent Developments                                                                              |
| Table 125. Global Semiconductor PI Film Sales Forecast by Region (2026-2035) & (K MT)                                                   |
| Table 126. Global Semiconductor PI Film Market Size Forecast by Region (2026-2035) & (M USD)                                            |
| Table 127. North America Semiconductor PI Film Sales Forecast by Country (2026-2035) & (K MT)                                           |
| Table 128. North America Semiconductor PI Film Market Size Forecast by Country (2026-2035) & (M USD)                                    |
| Table 129. Europe Semiconductor PI Film Sales Forecast by Country (2026-2035) & (K MT)                                                  |
| Table 130. Europe Semiconductor PI Film Market Size Forecast by Country (2026-2035) & (M USD)                                           |
| Table 131. Asia Pacific Semiconductor PI Film Sales Forecast by Region (2026-2035) & (K MT)                                             |
| Table 132. Asia Pacific Semiconductor PI Film Market Size Forecast by Region (2026-2035) & (M USD)                                      |
| Table 133. South America Semiconductor PI Film Sales Forecast by Country (2026-2035) & (K MT)                                           |
| Table 134. South America Semiconductor PI Film Market Size Forecast by Country (2026-2035) & (M USD)                                    |
| Table 135. Middle East and Africa Semiconductor PI Film Sales Forecast by Country (2026-2035) & (Units)                                 |
| Table 136. Middle East and Africa Semiconductor PI Film Market Size Forecast by Country (2026-2035) & (M USD)                           |
| Table 137. Global Semiconductor PI Film Sales Forecast by Type (2026-2035) & (K MT)                                                     |
| Table 138. Global Semiconductor PI Film Market Size Forecast by Type (2026-2035) & (M USD)                                              |
| Table 139. Global Semiconductor PI Film Price Forecast by Type (2026-2035) & (USD/KG)                                                   |
| Table 140. Global Semiconductor PI Film Sales (K MT) Forecast by Application                                                            |

(2026-2035)

Table 141. Global Semiconductor PI Film Market Size Forecast by Application  
(2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Semiconductor PI Film
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Semiconductor PI Film Market Size (M USD), 2025-2035
- Figure 5. Global Semiconductor PI Film Market Size (M USD) (2020-2035)
- Figure 6. Global Semiconductor PI Film Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Semiconductor PI Film Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Semiconductor PI Film Product Life Cycle
- Figure 13. Semiconductor PI Film Sales Share by Manufacturers in 2025
- Figure 14. Global Semiconductor PI Film Revenue Share by Manufacturers in 2025
- Figure 15. Semiconductor PI Film Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Semiconductor PI Film Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Semiconductor PI Film Revenue in 2025
- Figure 18. Industry Chain Map of Semiconductor PI Film
- Figure 19. Global Semiconductor PI Film Market PEST Analysis
- Figure 20. Global Semiconductor PI Film Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Semiconductor PI Film Market Share by Type
- Figure 27. Sales Market Share of Semiconductor PI Film by Type (2020-2025)
- Figure 28. Sales Market Share of Semiconductor PI Film by Type in 2025
- Figure 29. Market Share of Semiconductor PI Film by Type (2020-2025)
- Figure 30. Market Share of Semiconductor PI Film by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Semiconductor PI Film Market Share by Application

Figure 33. Global Semiconductor PI Film Sales Market Share by Application (2020-2025)

Figure 34. Global Semiconductor PI Film Sales Market Share by Application in 2025

Figure 35. Global Semiconductor PI Film Market Share by Application (2020-2025)

Figure 36. Global Semiconductor PI Film Market Share by Application in 2025

Figure 37. Global Semiconductor PI Film Sales Growth Rate by Application (2020-2025)

Figure 38. Global Semiconductor PI Film Sales Market Share by Region (2020-2025)

Figure 39. Global Semiconductor PI Film Market Size by Region (2020-2025)

Figure 40. North America Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 41. North America Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 42. North America Semiconductor PI Film Sales Market Share by Country in 2024

Figure 43. North America Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Semiconductor PI Film Market Size by Country in 2024

Figure 45. U.S. Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 46. U.S. Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Semiconductor PI Film Sales (K MT) and Growth Rate (2020-2025)

Figure 48. Canada Semiconductor PI Film Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Semiconductor PI Film Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Semiconductor PI Film Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 52. Europe Semiconductor PI Film Sales Market Share by Country in 2024

Figure 53. Europe Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Semiconductor PI Film Market Size by Country in 2024

Figure 55. Germany Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 58. France Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Semiconductor PI Film Sales and Growth Rate (K MT)

Figure 66. Asia Pacific Semiconductor PI Film Sales Market Share by Region in 2024

Figure 67. Asia Pacific Semiconductor PI Film Market Size by Region in 2024

Figure 68. China Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Semiconductor PI Film Sales and Growth Rate (K MT)

Figure 79. South America Semiconductor PI Film Sales Market Share by Country in 2024

Figure 80. South America Semiconductor PI Film Market Size and Growth Rate (M USD)

Figure 81. South America Semiconductor PI Film Market Size by Country in 2024

Figure 82. Brazil Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 85. Argentina Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 87. Columbia Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Semiconductor PI Film Sales and Growth Rate (K MT)

Figure 89. Middle East and Africa Semiconductor PI Film Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Semiconductor PI Film Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Semiconductor PI Film Market Size by Region in 2024

Figure 92. Saudi Arabia Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Semiconductor PI Film Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa Semiconductor PI Film Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Semiconductor PI Film Production Market Share by Region (2020-2025)

Figure 103. North America Semiconductor PI Film Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Semiconductor PI Film Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Semiconductor PI Film Production (K MT) Growth Rate (2020-2025)

Figure 106. China Semiconductor PI Film Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Semiconductor PI Film Sales Forecast by Volume (2020-2035) & (K

MT)

Figure 108. Global Semiconductor PI Film Market Size Forecast by Value (2020-2035)  
& (M USD)

Figure 109. Global Semiconductor PI Film Sales Market Share Forecast by Type  
(2026-2035)

Figure 110. Global Semiconductor PI Film Market Share Forecast by Type (2026-2035)

Figure 111. Global Semiconductor PI Film Sales Forecast by Application (2026-2035)

Figure 112. Global Semiconductor PI Film Market Share Forecast by Application  
(2026-2035)

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