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Global Black Matrix Resist (BM) Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GD3E58EA210FEN.html
Date: August 2026
Pages: 126
Price: US$ 4,480.00 (Single User License)
ID: GD3E58EA210FEN

Abstracts

The global Black Matrix Resist (BM) market size is expected to reach $ 1924 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Black matrix resist is a high-light-shielding photosensitive material used in display panels, touch panels, image sensors, and wafer-level optical devices. Its core function is to form fine black patterns on glass substrates, color filters, chip surfaces, or optical structures through coating, pre-baking, exposure, development, and curing, thereby shielding backlight, isolating RGB pixels, suppressing color crosstalk, reducing reflection, and improving display contrast and optical signal-to-noise ratio. The product is typically composed of light-shielding pigments or non-carbon black absorption systems, photosensitive resins, monomers, photoinitiators, solvents, and functional additives. Key technical indicators include optical density, line-width resolution, surface or volume resistivity, coating uniformity, adhesion, development window, low residue, heat resistance, chemical resistance, and low reflection performance. Typical products include black matrix materials for LCD color filters, black photoresists for OGS touch panel processes, black light-shielding materials for image sensors, chip-frame and backside shielding materials, and wafer-level lens shielding materials. Major customers include panel manufacturers, color filter manufacturers, touch module manufacturers, image sensor manufacturers, and semiconductor optical device manufacturers.

The industrial value of Black Matrix Resist comes from the rigid demand for fine light-shielding structures in display and optical devices. As panel resolution increases, pixel pitch becomes smaller, display contrast improves, and touch and optical sensor structures become more integrated, the black matrix is no longer merely a simple black isolation layer. It has become a key functional material that simultaneously provides light shielding, color separation, low reflection, surface resistivity control, and pattern

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stability. This type of product must balance high optical density with high resolution while maintaining low residue, strong adhesion, and heat and chemical stability during coating, exposure, development, curing, cleaning, and subsequent stacking processes. For customers, whether the material can fit existing exposure tools, developer systems, substrate sizes, curing conditions, and production-line takt time is often more important than any single performance metric. Therefore, Black Matrix Resist is a highly process-bound electronic chemical. In the future, as demand grows for high-resolution mobile terminals, automotive displays, professional displays, and miniaturized camera modules, Black Matrix Resist will continue to extend beyond traditional LCD color filters into touch panels, image sensors, and wafer-level optical light-shielding applications.

From the perspective of competition, Black Matrix Resist still features clear regional clustering and customer qualification barriers. Companies in Japan, Taiwan, South Korea, and mainland China form the main supply base. Japanese companies have long-term strengths in photoresist formulation, display chemicals, and high-reliability materials. Taiwanese companies benefit from strong customer collaboration and mass-production responsiveness within the panel supply chain. Korean companies have integrated capabilities across display materials and semiconductor electronic materials, while mainland Chinese companies benefit from concentrated panel capacity, localized supply requirements, and the substitution of key imported materials. Competition in this industry is not driven simply by low prices, but by formulation stability, batch consistency, speed of customer qualification, production-line issue response, and adaptability to multiple substrate generations. Because Black Matrix Resist usually needs to be adjusted according to the process window of panel or optical device customers, replacement costs are relatively high once a supplier enters mass production, resulting in strong customer stickiness. Companies with integrated capabilities in R&D, production, quality control, and on-site technical service are therefore more likely to build a long-term order base.

The overall industry outlook is positive because terminal displays and optical devices continue to upgrade toward higher resolution, higher brightness, higher contrast, narrower bezels, more cameras, and more sensors. New opportunities for Black Matrix Resist will mainly come from three directions. The first is demand from high-end LCD and automotive displays for higher light shielding, finer line width, and more stable resistivity control. The second is demand from touch panels and bezel light-shielding structures for high surface resistivity, flatness, and appearance consistency. The third is demand from image sensors, wafer-level lenses, and chip light-shielding structures for visible and near-infrared absorption, low reflection, and non-carbon high-optical-density

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systems. At the same time, customers will continue to raise requirements for greener formulations, lower defects, lower metal impurities, and stable supply, pushing formulation companies toward more refined resin design, absorber dispersion, low-temperature curing, and customized services. As the mainland Chinese display materials supply chain matures and regional customer qualification experience accumulates, local suppliers are expected to increase their market participation, while the industry trends toward steady iteration of high-end products, more diversified regional supply chains, and gradual expansion of application scope.

This report studies the global Black Matrix Resist (BM) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Black Matrix Resist (BM) and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Black Matrix Resist (BM) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Black Matrix Resist (BM) total production and demand, 2021-2032, (MT)
Global Black Matrix Resist (BM) total production value, 2021-2032, (USD Million)
Global Black Matrix Resist (BM) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)
Global Black Matrix Resist (BM) consumption by region & country, CAGR, 2021-2032 & (MT)
U.S. VS China: Black Matrix Resist (BM) domestic production, consumption, key domestic manufacturers and share
Global Black Matrix Resist (BM) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)
Global Black Matrix Resist (BM) production by Exposure and Development, production, value, CAGR, 2021-2032, (USD Million) & (MT)
Global Black Matrix Resist (BM) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Black Matrix Resist (BM) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include NIPPON STEEL Chemical & Material Co., Ltd.,

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Daxin Materials Corp., FUJIFILM Electronic Materials, Tokyo Ohka Kogyo Co., Ltd., LG Chem, Ltd., Advanced Echem Materials Company Ltd., Toyo Visual Solutions Co., Ltd., TopGiga Material Corp., Everlight Chemical Industrial Corporation, Chem E Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Black Matrix Resist (BM) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (MT) and average price (US$/MT) by manufacturer, by Exposure and Development, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Black Matrix Resist (BM) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Black Matrix Resist (BM) Market, Segmentation by Exposure and Development:

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Negative Tone Development

Positive Tone Development

Global Black Matrix Resist (BM) Market, Segmentation by Coating Process:

Spin Coating

Slit Coating

Slit-Spin Hybrid Coating

Other

Global Black Matrix Resist (BM) Market, Segmentation by Substrate Generation:

G2 to G3.5

G4 to G6

G7 to G8.5

G10 and Above

Global Black Matrix Resist (BM) Market, Segmentation by Application:

LCD Color Filter Black Matrix

Touch Panel Black Matrix

Others

Companies Profiled:

NIPPON STEEL Chemical & Material Co., Ltd.

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Daxin Materials Corp.

FUJIFILM Electronic Materials

Tokyo Ohka Kogyo Co., Ltd.

LG Chem, Ltd.

Advanced Echem Materials Company Ltd.

Toyo Visual Solutions Co., Ltd.

TopGiga Material Corp.

Everlight Chemical Industrial Corporation

Chem E Co., Ltd.

Fuyang Sineva New Materials Technology Co., Ltd.

Jiangsu Boyan Electronic Technology Co., Ltd.

Dongjin Semichem Co., Ltd.

Sumitomo Chemical Co., Ltd.

Key Questions Answered:
1. How big is the global Black Matrix Resist (BM) market?
2. What is the demand of the global Black Matrix Resist (BM) market?
3. What is the year over year growth of the global Black Matrix Resist (BM) market?
4. What is the production and production value of the global Black Matrix Resist (BM) market?
5. Who are the key producers in the global Black Matrix Resist (BM) market?
6. What are the growth factors driving the market demand?

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