

Global Chemicals for PCB Horizontal Electroless Copper Process Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Chemicals for PCB Horizontal Electroless Copper Process market size was valued at US\$ 659 million in 2025 and is forecast to a readjusted size of US\$ 974 million by 2032 with a CAGR of 6.0% during review period.

Chemicals for PCB Horizontal Electroless Copper Process are critical precision chemical materials utilized in the production of printed circuit boards (PCBs) for the horizontal Plated-Through Hole (PTH) process. Through chemical reactions, these materials deposit a continuous, dense layer of copper onto the non-conductive substrate (resin/fiberglass) following the drilling stage, thereby achieving hole metallization and establishing electrical connections between layers. The core of this system comprises a series of combined chemical solutions, including degreasers, micro-etchants, pre-dips, activators, and accelerators.

Horizontal electroless copper plating constitutes the core of the hole metallization process in PCB manufacturing. The upstream segment of its supply chain primarily consists of basic chemical raw materials and precision chemicals, including high-purity copper salts (such as copper sulfate), complexing agents (such as EDTA and tartrates), reducing agents (such as formaldehyde or hypophosphites), pH regulators, and various high-end surfactants. Fluctuations in raw material prices and purity standards within the upstream sector directly determine the performance stability of the electroless copper plating solutions. The midstream segment comprises the manufacturers and R&D entities responsible for formulating these plating chemicals. This stage presents extremely high technical barriers; the solutions must not only demonstrate superior wetting capabilities and coverage on hole walls but also be highly compatible with

horizontal conveyor systems to facilitate automated, large-scale, and continuous production operations. The downstream segment primarily serves PCB manufacturers, covering the production of multilayer boards, HDI boards, and flexible circuit boards.

In 2025, global sales volume is projected to be around 160,000 tons, with market prices ranging roughly from USD 3,000 to 5,200 per ton. The gross margins of major enterprises are expected to fall within the range of 35% to 50%.

The industry for chemicals used in horizontal electroless copper plating for PCBs is currently navigating a critical transitional phase?shifting from a focus on 'scale expansion' to one of 'technical refinement.' Industry growth is primarily driven by a surge in demand?stemming from AI servers, 5G base stations, and new energy vehicles?for high-layer-count, High-Density Interconnect (HDI), and micro-via PCBs. This demand necessitates electroless copper plating solutions possessing exceptional permeability, via-wall coverage quality, and plating ductility to effectively address the increasingly complex challenges associated with via-wall metallization. Concurrently, global trends in green manufacturing are accelerating the adoption of 'formaldehyde-free' and 'cyanide-free' processes, positioning eco-friendly alternatives as a new engine for market growth. Nevertheless, significant industry hurdles persist; in particular, upstream raw materials?centered on high-purity complexing agents and colloidal palladium?remain highly susceptible to fluctuations in international trade and supply chain instability. Furthermore, the R&D of chemical solutions for horizontal plating lines entails intricate electrochemical formulations and precise equipment integration, establishing an exceptionally high technical barrier to entry. Overall, the specialized chemicals sector for horizontal PCB copper plating remains in a phase characterized by robust and certain demand, where both technological innovation and domestic substitution are advancing in parallel. Future market leaders are most likely to be those enterprises capable of not only demonstrating long-term, proven performance on high-end PCB types but also continuously optimizing their capabilities in terms of cost-efficiency, environmental compliance, and comprehensive horizontal line integration support.

This report is a detailed and comprehensive analysis for global Chemicals for PCB Horizontal Electroless Copper Process market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the

year 2025, are provided.

Key Features:

Global Chemicals for PCB Horizontal Electroless Copper Process market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Chemicals for PCB Horizontal Electroless Copper Process market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Chemicals for PCB Horizontal Electroless Copper Process market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Chemicals for PCB Horizontal Electroless Copper Process market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Chemicals for PCB Horizontal Electroless Copper Process

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Chemicals for PCB Horizontal Electroless Copper Process market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Atotech, MacDermid Alpha, Qnity, Okuno Chemical Industries, Jetchem, Guangzhou Sanfu New Materials, Shanghai Skychem Technology, GHTECH, Harvar New Materials, etc.

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

Market Segmentation

Chemicals for PCB Horizontal Electroless Copper Process market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Degreaser

Hole Conditioner

Microetchant

Activator

Others

Market segment by Attributes

Standard

Eco-friendly

Market segment by Application Board Types

MLB

HDI Boards

FPC

Rigid-Flex Boards

Others

Market segment by Application

AI Servers & Data Centers

Networking & Communications

Automotive Electronics

Consumer Electronics

Others

Major players covered

Atotech

MacDermid Alpha

Qnity

Okuno Chemical Industries

Jetchem

Guangzhou Sanfu New Materials

Shanghai Skychem Technology

GHTECH

Harvar New Materials

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Chemicals for PCB Horizontal Electroless Copper Process product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Chemicals for PCB Horizontal Electroless Copper Process, with price, sales quantity, revenue, and global market share of Chemicals for PCB Horizontal Electroless Copper Process from 2021 to 2026.

Chapter 3, the Chemicals for PCB Horizontal Electroless Copper Process competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Chemicals for PCB Horizontal Electroless Copper Process breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Chemicals for PCB Horizontal Electroless Copper

Process market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Chemicals for PCB Horizontal Electroless Copper Process.

Chapter 14 and 15, to describe Chemicals for PCB Horizontal Electroless Copper Process sales channel, distributors, customers, research findings and conclusion.

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