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Global Diaryliodonium PAG Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Diaryliodonium PAG market size is expected to reach $ 432 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

Diaryliodonium salt photoacid generators are ionic onium-type PAGs based on diaryliodonium cations and non-nucleophilic counter anions. Upon irradiation, the iodonium cation decomposes and generates strong acid species that initiate cationic polymerization or acid-catalyzed reactions in UV-curable formulations and chemically amplified photoresists.

Diaryliodonium salt PAGs should be treated as a standalone ionic photoacid generator family based on the general structure Ar?I?X?. They should not be mixed with triarylsulfonium salts, oxime sulfonates, imidosulfonates, radical photoinitiators, complete photoresist formulations, UV coatings, inks or downstream cured products.

From the demand side, the market has a clear two-segment structure. The larger-volume segment is industrial cationic UV curing, where diaryliodonium PAGs are used in epoxy, oxetane and vinyl ether systems for coatings, inks, adhesives, encapsulants and 3D printing resins. In this segment, customers care most about cure speed, UV LED compatibility, low yellowing, low odour, low migration, solubility and formulation stability. The higher-value segment is photoresist and electronic materials, where volume is smaller but ASP is much higher and customers require low metals, low particles, controlled water content, acid value, counter-anion purity, acid diffusion and long qualification cycles.

The key differentiation factors are not limited to acid generation. The real technical barriers are counter-anion design, diaryliodonium cation structure, wavelength

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response, sensitizer compatibility, resin compatibility, low migration, low yellowing, storage stability and clean impurity control. Industrial UV-curing customers focus on cure performance, formulation cost and application reliability, while semiconductor and electronic-material customers focus on trace metals, particles, acid diffusion, absorption wavelength and batch-to-batch consistency.

Commercially, diaryliodonium PAGs are a medium-volume, high-technical-barrier specialty photochemical market. Industrial-grade products account for more tonnage, while semiconductor and electronic-grade products command higher margins and have much higher qualification barriers. Future growth should be supported by UV LED curing, electronic adhesives, 3D printing, display materials, advanced packaging, localization of photoresist raw materials, and demand for low-migration, antimony-free and high-purity PAGs.

This report studies the global Diaryliodonium PAG production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Diaryliodonium PAG 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 Diaryliodonium PAG that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Diaryliodonium PAG total production and demand, 2021-2032, (Tons)
Global Diaryliodonium PAG total production value, 2021-2032, (USD Million)
Global Diaryliodonium PAG production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Diaryliodonium PAG consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Diaryliodonium PAG domestic production, consumption, key domestic manufacturers and share
Global Diaryliodonium PAG production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Diaryliodonium PAG production by Counter Anion, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Diaryliodonium PAG production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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This report profiles key players in the global Diaryliodonium PAG 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 San-Apro Ltd., IGM Resins, Hampford Research Inc., Toyo Gosei Co., Ltd., Changzhou Tronly New Electronic Materials Co., Ltd., Double Bond Chemical Ind., Co., Ltd., Sinocure Chemical, TCI Chemicals, Merck KGaA, FUJIFILM Wako Pure Chemical, 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 Diaryliodonium PAG market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Counter Anion, 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 Diaryliodonium PAG Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Global Diaryliodonium PAG Market, Segmentation by Counter Anion:

Hexafluorophosphate Salts

Hexafluoroantimonate Salts

Tetrakis(perfluorophenyl)borate Salts

Triflate Salts

Nonaflate / Perfluorobutanesulfonate Salts

Organogallate / Special Phosphate Salts

Global Diaryliodonium PAG Market, Segmentation by Delivery Form:

Powder / Crystalline Solid

Propylene Carbonate Solution

Reactive Diluent Solution

Electronics Solvent Solution

Masterbatch / Formulation Blend

Global Diaryliodonium PAG Market, Segmentation by Iodonium Cation Structure:

Diphenyliodonium Salts

Bis(p-tolyl)iodonium Salts

Alkyl-substituted Diaryliodonium Salts

Asymmetric Diaryliodonium Salts

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Functionalized Diaryliodonium Salts

Global Diaryliodonium PAG Market, Segmentation by Application:

Cationic UV Coatings and Inks

Electronics Adhesives and Encapsulation

Semiconductor / Photoresist Materials

3D Printing / Additive Manufacturing

Display / PCB Photoresist and Imaging

Companies Profiled:

San-Apro Ltd.

IGM Resins

Hampford Research Inc.

Toyo Gosei Co., Ltd.

Changzhou Tronly New Electronic Materials Co., Ltd.

Double Bond Chemical Ind., Co., Ltd.

Sinocure Chemical

TCI Chemicals

Merck KGaA

FUJIFILM Wako Pure Chemical

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Nanjing Guarson New Material Technology

Key Questions Answered:

1. How big is the global Diaryliodonium PAG market?
2. What is the demand of the global Diaryliodonium PAG market?
3. What is the year over year growth of the global Diaryliodonium PAG market?
4. What is the production and production value of the global Diaryliodonium PAG market?
5. Who are the key producers in the global Diaryliodonium PAG market?
6. What are the growth factors driving the market demand?

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