

Global Dry Film Photoresist for Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dry Film Photoresist for Packaging market size is expected to reach \$ 321 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Dry film photoresist for packaging refers to a sheet-type photosensitive material used for pattern transfer, circuit formation, metal plating, etching protection, and fine interconnect fabrication in semiconductor packaging processes. It is typically composed of photosensitive resin, photoinitiators, functional monomers, additives, and carrier films. Through lamination, exposure, development, plating, etching, and stripping, the material forms precise patterns on package substrates, wafer-level packages, panel-level packages, and chip interconnect structures. Compared with liquid photoresist, dry film photoresist offers better thickness uniformity, stable processing windows, high material utilization, suitability for large-area lamination, and strong compatibility with thicker metal patterning, making it a key material for advanced packaging, high-density package substrates, and high-reliability chip interconnect manufacturing.

In 2025, global Dry film photoresist for packaging production reached approximately 242 million Sqm, with an average global market price of around US\$ 887 per K Sqm.

The upstream raw materials of Dry film photoresist for packaging mainly include photopolymer resins, acrylic or epoxy-based binders, photoinitiators, monomers, oligomers, dyes, inhibitors, plasticizers, adhesion promoters, solvents, polyethylene terephthalate carrier film and polyethylene protective film. Typical upstream suppliers include Mitsubishi Chemical, Kuraray, Arkema, BASF, Evonik, Eastman, Dow, LG Chem, Toray, Toyobo, SKC, Kolon Industries, Mitsui Chemicals, Fujifilm, DIC, IGM Resins and other specialty chemical and functional film companies.

Dry film photoresist for packaging is mainly used in IC Package Substrate Circuit Patterning, Wafer-Level / Panel-Level Packaging RDL, Chip Interconnect, and Others. Major customers include Shinko Electric Industries, Unimicron, Nan Ya PCB, TSMC, ASE Technology, Amkor Technology, etc.

The gross margin of Dry film photoresist for packaging varies significantly by product grade, application field and customer qualification level. The gross margin is around 25%-50%.

By product type, Dry film photoresist for packaging can be segmented into Ultra-thin Dry Film ($\leq 15\ \mu\text{m}$), Thin Dry Film ($15\text{--}50\ \mu\text{m}$), Standard Dry Film ($50\text{--}100\ \mu\text{m}$), and Thick Dry Film ($>100\ \mu\text{m}$). Ultra-thin Dry Film ($\leq 15\ \mu\text{m}$) is mainly used in high-resolution and fine-line patterning applications where edge definition, development cleanliness, and thickness uniformity are critical. Thin Dry Film ($15\text{--}50\ \mu\text{m}$) balances resolution and process adaptability, making it important for fine circuit formation, redistribution layer fabrication, and high-density interconnect structures. Standard Dry Film ($50\text{--}100\ \mu\text{m}$) is widely used in package substrate circuit patterning, plating masks, and protective patterning, offering a balanced combination of performance, cost, and process stability. Thick Dry Film ($>100\ \mu\text{m}$) is primarily used for thick metal deposition, bumping, copper pillar formation, deep pattern structures, and packaging processes requiring strong plating resistance, where adhesion, plating durability, development integrity, and stripping performance are especially important.

In terms of application, Dry film photoresist for packaging is mainly used in IC Package Substrate Circuit Patterning, Wafer-Level / Panel-Level Packaging RDL, Chip Interconnect, and Others. IC Package Substrate Circuit Patterning is a major application area, as package substrates continue to move toward higher density, finer line width, narrower spacing, and multilayer architectures. This requires dry film photoresist to deliver high resolution, strong adhesion, chemical resistance, and dimensional stability. Wafer-Level / Panel-Level Packaging RDL applications require uniform large-area lamination, fine-pattern resolution, low defect density, and strong process consistency, driving demand for thin and ultra-thin dry films. Chip Interconnect applications focus on the formation quality of bumps, copper pillars, micro-bumps, and metal interconnect structures, where standard and thick dry films have strong relevance. Other applications include auxiliary packaging patterns, temporary protection, special plating structures, and customized semiconductor packaging processes.

Market growth is mainly driven by the upgrade of advanced packaging technologies,

rising demand for high-performance computing chips, expansion of artificial intelligence servers and data centers, growth in automotive electronics and power device packaging, higher package substrate density, increasing adoption of wafer-level and panel-level packaging, and the trend toward heterogeneous chip integration. As the cost and complexity of front-end process scaling continue to increase, packaging has become a more important path for improving system-level performance. Redistribution layers, chip interconnects, bumps, copper pillars, and high-density package substrates all require better dry film photoresist performance in resolution, thickness control, adhesion, plating resistance, and reliability. Suppliers with high-cleanliness production capability, stable batch control, strong technical support, and joint development capability with packaging customers are expected to gain stronger competitive positions.

Key market restraints include high technical barriers for advanced products, long customer qualification cycles, strict formulation and mass-production stability requirements, volatility in key raw material supply, rapid evolution of advanced packaging process routes, cyclical capital expenditure by wafer fabs and outsourced semiconductor assembly and test companies, intensifying price competition, and rising environmental and safety compliance requirements. Dry film photoresist for packaging must simultaneously meet requirements for lamination performance, exposure sensitivity, resolution, development behavior, plating resistance, stripping performance, and low defect density. Weakness in any single performance parameter may affect production yield. In addition, customer-specific differences in equipment, exposure energy, developer chemistry, plating systems, and substrate materials make product qualification complex and time-consuming. For new entrants, mass-production validation, reliability testing, process adaptation, and stable supply capability remain major barriers to entry.

Report Scope

This report studies the global Dry Film Photoresist for Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dry Film Photoresist for Packaging 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 Dry Film Photoresist for Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dry Film Photoresist for Packaging total production and demand, 2021-2032, (million Sqm)

Global Dry Film Photoresist for Packaging total production value, 2021-2032, (USD Million)

Global Dry Film Photoresist for Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm), (based on production site)

Global Dry Film Photoresist for Packaging consumption by region & country, CAGR, 2021-2032 & (million Sqm)

U.S. VS China: Dry Film Photoresist for Packaging domestic production, consumption, key domestic manufacturers and share

Global Dry Film Photoresist for Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (million Sqm)

Global Dry Film Photoresist for Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)

Global Dry Film Photoresist for Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)

This report profiles key players in the global Dry Film Photoresist for Packaging 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 Asahi Kasei Corporation, Eternal Materials, Resonac Corporation (Showa Denko Materials), Qnity Electronics (DuPont Riston), Hunan Initial New Materials, Nagase ChemteX America, Nippon Kayaku, 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 Dry Film Photoresist for Packaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (million Sqm) and average price (US\$/Sqm) by manufacturer, by Type, 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 Dry Film Photoresist for Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Dry Film Photoresist for Packaging Market, Segmentation by Type:

Ultra-thin Dry Film ($<15 \text{ ?m}$)

Thin Dry Film ($15\text{?}50 \text{ ?m}$)

Standard Dry Film ($50\text{?}100 \text{ ?m}$)

Thick Dry Film ($>100 \text{ ?m}$)

Global Dry Film Photoresist for Packaging Market, Segmentation by Development Method:

Aqueous-developable

Solvent-developable

Global Dry Film Photoresist for Packaging Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global Dry Film Photoresist for Packaging Market, Segmentation by Photochemical Reaction Mechanism:

Positive Dry Film Photoresist

Negative Dry Film Photoresist

Global Dry Film Photoresist for Packaging Market, Segmentation by Application:

IC Package Substrate Circuit Patterning

Wafer-Level / Panel-Level Packaging RDL

Chip Interconnect

Others

Companies Profiled:

Asahi Kasei Corporation

Eternal Materials

Resonac Corporation (Showa Denko Materials)

Qnity Electronics (DuPont Riston)

Hunan Initial New Materials

Nagase ChemteX America

Nippon Kayaku

Key Questions Answered:

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

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