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# Global Dry Film Solder Mask (DFSM) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Dry Film Solder Mask (DFSM) market size is expected to reach $ 274 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

Dry Film Solder Mask (DFSM), also known as Dry Film Solder Resist, is a photoimageable dry-film protective material used to form a permanent solder mask layer on the surface of electronic substrates. It is typically supplied in roll or sheet form and laminated onto printed circuit boards, flexible circuit boards, semiconductor package substrates or other electronic substrates through vacuum lamination or hot-roll lamination. After exposure, development and final curing, DFSM forms patterned openings and a protective insulating layer that prevents solder bridging, protects copper circuits, improves surface flatness and enhances electrical, thermal and environmental reliability.

In 2025, global Dry Film Solder Mask (DFSM) production reached approximately 52031 K Sqm, with an average global market price of around US$ 3.2 per Sqm.

The upstream raw materials of DFSM mainly include epoxy resin, acrylic resin, phenolic resin, photopolymerizable monomers, photoinitiators, thermal curing agents, pigments, fillers, adhesion promoters, leveling agents, defoamers, solvents, polyethylene terephthalate carrier film and polyethylene protective film. Representative upstream suppliers include Mitsubishi Chemical Group, DIC Corporation, Daicel Corporation, Nippon Shokubai, BASF, Arkema, Eastman Chemical, Dow, etc.

The downstream applications of DFSM mainly include PCB, Semiconductor Packaging and Others. Representative downstream customers include Zhen Ding Technology,

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Unimicron, Compeq, Tripod Technology, TTM Technologies, AT&S, etc.

The gross margin of DFSM varies significantly by thickness, application field, customer qualification level and product reliability requirements. The gross margins is around 30%?60%.

By product type, DFSM can be divided into Thin Dry Film, Standard Dry Film and Thick Dry Film. Thin Dry Film refers to products with a thickness of less than 30 ?m and is mainly used in applications requiring thin protective layers, fine pad openings, high-resolution patterns and low-profile structures, such as high-density circuits, flexible substrates and selected semiconductor package substrates. Standard Dry Film refers to products with a thickness of 30?100 ?m and represents the most broadly used product range, balancing protection strength, process stability, lamination compatibility and cost efficiency. It is widely used in general printed circuit boards, flexible circuit boards, rigid-flex boards and package substrates. Thick Dry Film refers to products with a thickness of more than 100 ?m and is mainly used where stronger insulation, thicker protective coverage, higher mechanical protection or special structural filling is required, including high-reliability electronic modules, specialty substrates, thick-copper circuits and selected customized packaging applications.

By application, PCB represents an important application area for DFSM, where the material is used on rigid boards, flexible boards, rigid-flex boards and high-density interconnect boards to provide outer-layer protection, pad openings, circuit insulation, surface planarization and soldering reliability. Semiconductor Packaging is the most technology-driven and value-enhancing application area for DFSM. The material can be used on package substrates, flip-chip package substrates, advanced package substrates and fine interconnection structures, where film thickness uniformity, low warpage, fine opening capability, low defect density and long-term insulation reliability are critical.

Market Driving Factors are mainly supported by the increasing density and miniaturization of electronic products, which create stronger demand for fine solder mask openings; the shift of printed circuit boards toward high-density interconnect, multilayer, flexible and high-reliability structures, which raises requirements for film thickness consistency and surface flatness; the development of semiconductor packaging technologies such as advanced packaging, flip-chip packaging, package substrates and high-density interconnection structures, which drives demand for high-reliability DFSM; the growth of artificial intelligence servers, high-performance computing, automotive electronics, new energy vehicles, communications equipment

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and high-end consumer electronics, which expands demand for premium circuit boards and package substrates; the increasing focus of downstream customers on low defect density, low warpage, clean processing and long-term reliability, which makes dry-film solder mask more attractive in selected high-end applications; and the development of regional supply chain security, electronic material localization, package substrate investment and flexible electronics, which creates new opportunities for DFSM suppliers.

Market Restraints mainly include the high technical barriers in DFSM formulation and precision coating, as photosensitive resin chemistry, thermal curing systems, filler dispersion, thickness control and clean coating processes require long-term know-how; the strong cost advantage, mature production infrastructure and broad customer acceptance of liquid photoimageable solder mask in standard PCB manufacturing, which limits large-scale substitution by DFSM; long customer qualification cycles, especially in semiconductor packaging and high-reliability circuit board applications that require strict reliability, thermal resistance, insulation and batch-stability validation; raw material price fluctuations in resins, photoinitiators, functional fillers and carrier films, which can affect production costs and gross margins; the higher requirements of DFSM for lamination equipment, exposure and development conditions, post-curing windows and substrate surface treatment, which require process matching and production-line adjustment at customer sites; and cyclical fluctuations in consumer electronics, servers, automotive electronics and semiconductor capital expenditure, which may lead to order volatility and inventory adjustments.

This report studies the global Dry Film Solder Mask (DFSM) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dry Film Solder Mask (DFSM) 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 Solder Mask (DFSM) that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Dry Film Solder Mask (DFSM) total production and demand, 2021-2032, (K Sqm)
Global Dry Film Solder Mask (DFSM) total production value, 2021-2032, (USD Million)
Global Dry Film Solder Mask (DFSM) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

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Global Dry Film Solder Mask (DFSM) consumption by region & country, CAGR, 2021-2032 & (K Sqm)
U.S. VS China: Dry Film Solder Mask (DFSM) domestic production, consumption, key domestic manufacturers and share
Global Dry Film Solder Mask (DFSM) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)
Global Dry Film Solder Mask (DFSM) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)
Global Dry Film Solder Mask (DFSM) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Dry Film Solder Mask (DFSM) 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 Taiyo Holdings Co., Ltd., Resonac Corporation, Eternal Materials Co., Ltd., Hangzhou First Electronic Material Co., Ltd., Taiyo America, Inc., TAIYO INK MFG. CO. (KOREA) 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 Dry Film Solder Mask (DFSM) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Sqm) and average price (US$/Sq m) 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 Solder Mask (DFSM) Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Global Dry Film Solder Mask (DFSM) Market, Segmentation by Type:

Thin Dry Film (100 ?m)

Global Dry Film Solder Mask (DFSM) Market, Segmentation by Color:

Green Dry Film Solder Mask

Transparent and Amber Dry Film Solder Mask

Others

Global Dry Film Solder Mask (DFSM) Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global Dry Film Solder Mask (DFSM) Market, Segmentation by Application:

PCB

Semiconductor Packaging

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Other

Companies Profiled:

Taiyo Holdings Co., Ltd.

Resonac Corporation

Eternal Materials Co., Ltd.

Hangzhou First Electronic Material Co., Ltd.

Taiyo America, Inc.

TAIYO INK MFG. CO. (KOREA) LTD.

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

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# Contents


## 1 SUPPLY SUMMARY

1.1 Dry Film Solder Mask (DFSM) Introduction
1.2 World Dry Film Solder Mask (DFSM) Supply & Forecast
  1.2.1 World Dry Film Solder Mask (DFSM) Production Value (2021 & 2025 & 2032)
  1.2.2 World Dry Film Solder Mask (DFSM) Production (2021-2032)
  1.2.3 World Dry Film Solder Mask (DFSM) Pricing Trends (2021-2032)
1.3 World Dry Film Solder Mask (DFSM) Production by Region (Based on Production Site)
  1.3.1 World Dry Film Solder Mask (DFSM) Production Value by Region (2021-2032)
  1.3.2 World Dry Film Solder Mask (DFSM) Production by Region (2021-2032)
  1.3.3 World Dry Film Solder Mask (DFSM) Average Price by Region (2021-2032)
  1.3.4 North America Dry Film Solder Mask (DFSM) Production (2021-2032)
  1.3.5 China Dry Film Solder Mask (DFSM) Production (2021-2032)
  1.3.6 Japan Dry Film Solder Mask (DFSM) Production (2021-2032)
  1.3.7 China Taiwan Dry Film Solder Mask (DFSM) Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Dry Film Solder Mask (DFSM) Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Dry Film Solder Mask (DFSM) Major Market Trends

## 2 DEMAND SUMMARY

2.1 World Dry Film Solder Mask (DFSM) Demand (2021-2032)
2.2 World Dry Film Solder Mask (DFSM) Consumption by Region
  2.2.1 World Dry Film Solder Mask (DFSM) Consumption by Region (2021-2026)
  2.2.2 World Dry Film Solder Mask (DFSM) Consumption Forecast by Region (2027-2032)
2.3 United States Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.4 China Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.5 Europe Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.6 Japan Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.7 South Korea Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.8 ASEAN Dry Film Solder Mask (DFSM) Consumption (2021-2032)
2.9 India Dry Film Solder Mask (DFSM) Consumption (2021-2032)

## 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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3.1 World Dry Film Solder Mask (DFSM) Production Value by Manufacturer (2021-2026)
3.2 World Dry Film Solder Mask (DFSM) Production by Manufacturer (2021-2026)
3.3 World Dry Film Solder Mask (DFSM) Average Price by Manufacturer (2021-2026)
3.4 Dry Film Solder Mask (DFSM) Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Dry Film Solder Mask (DFSM) Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Dry Film Solder Mask (DFSM) in 2025
  3.5.3 Global Concentration Ratios (CR8) for Dry Film Solder Mask (DFSM) in 2025
3.6 Dry Film Solder Mask (DFSM) Market: Overall Company Footprint Analysis
  3.6.1 Dry Film Solder Mask (DFSM) Market: Region Footprint
  3.6.2 Dry Film Solder Mask (DFSM) Market: Company Product Type Footprint
  3.6.3 Dry Film Solder Mask (DFSM) Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

**4 UNITED STATES VS CHINA VS REST OF THE WORLD**

4.1 United States VS China: Dry Film Solder Mask (DFSM) Production Value Comparison
  4.1.1 United States VS China: Dry Film Solder Mask (DFSM) Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Dry Film Solder Mask (DFSM) Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Dry Film Solder Mask (DFSM) Production Comparison
  4.2.1 United States VS China: Dry Film Solder Mask (DFSM) Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Dry Film Solder Mask (DFSM) Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Dry Film Solder Mask (DFSM) Consumption Comparison
  4.3.1 United States VS China: Dry Film Solder Mask (DFSM) Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Dry Film Solder Mask (DFSM) Consumption Market Share Comparison (2021 & 2025 & 2032)

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info@marketpublishers.com

4.4 United States Based Dry Film Solder Mask (DFSM) Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Dry Film Solder Mask (DFSM) Production Value (2021-2026)
4.4.3 United States Based Manufacturers Dry Film Solder Mask (DFSM) Production (2021-2026)
4.5 China Based Dry Film Solder Mask (DFSM) Manufacturers and Market Share
4.5.1 China Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Dry Film Solder Mask (DFSM) Production Value (2021-2026)
4.5.3 China Based Manufacturers Dry Film Solder Mask (DFSM) Production (2021-2026)
4.6 Rest of World Based Dry Film Solder Mask (DFSM) Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production (2021-2026)

## 5 MARKET ANALYSIS BY TYPE

5.1 World Dry Film Solder Mask (DFSM) Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Thin Dry Film (100 ?m)
5.3 Market Segment by Type
5.3.1 World Dry Film Solder Mask (DFSM) Production by Type (2021-2032)
5.3.2 World Dry Film Solder Mask (DFSM) Production Value by Type (2021-2032)
5.3.3 World Dry Film Solder Mask (DFSM) Average Price by Type (2021-2032)

## 6 MARKET ANALYSIS BY COLOR

6.1 World Dry Film Solder Mask (DFSM) Market Size Overview by Color: 2021 VS 2025 VS 2032

+357 96 030922
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6.2 Segment Introduction by Color
6.2.1 Green Dry Film Solder Mask
6.2.2 Transparent and Amber Dry Film Solder Mask
6.2.3 Others
6.3 Market Segment by Color
6.3.1 World Dry Film Solder Mask (DFSM) Production by Color (2021-2032)
6.3.2 World Dry Film Solder Mask (DFSM) Production Value by Color (2021-2032)
6.3.3 World Dry Film Solder Mask (DFSM) Average Price by Color (2021-2032)

**7 MARKET ANALYSIS BY SALES CHANNEL**

7.1 World Dry Film Solder Mask (DFSM) Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Sales Channel
7.2.1 Direct Sales
7.2.2 Indirect Sales
7.3 Market Segment by Sales Channel
7.3.1 World Dry Film Solder Mask (DFSM) Production by Sales Channel (2021-2032)
7.3.2 World Dry Film Solder Mask (DFSM) Production Value by Sales Channel (2021-2032)
7.3.3 World Dry Film Solder Mask (DFSM) Average Price by Sales Channel (2021-2032)

**8 MARKET ANALYSIS BY APPLICATION**

8.1 World Dry Film Solder Mask (DFSM) Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 PCB
8.2.2 Semiconductor Packaging
8.2.3 Other
8.3 Market Segment by Application
8.3.1 World Dry Film Solder Mask (DFSM) Production by Application (2021-2032)
8.3.2 World Dry Film Solder Mask (DFSM) Production Value by Application (2021-2032)
8.3.3 World Dry Film Solder Mask (DFSM) Average Price by Application (2021-2032)

**9 COMPANY PROFILES**

+357 96 030922
info@marketpublishers.com

9.1 Taiyo Holdings Co., Ltd.
9.1.1 Taiyo Holdings Co., Ltd. Details
9.1.2 Taiyo Holdings Co., Ltd. Major Business
9.1.3 Taiyo Holdings Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
9.1.4 Taiyo Holdings Co., Ltd. Dry Film Solder Mask (DFSM) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Taiyo Holdings Co., Ltd. Recent Developments/Updates
9.1.6 Taiyo Holdings Co., Ltd. Competitive Strengths & Weaknesses
9.2 Resonac Corporation
9.2.1 Resonac Corporation Details
9.2.2 Resonac Corporation Major Business
9.2.3 Resonac Corporation Dry Film Solder Mask (DFSM) Product and Services
9.2.4 Resonac Corporation Dry Film Solder Mask (DFSM) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Resonac Corporation Recent Developments/Updates
9.2.6 Resonac Corporation Competitive Strengths & Weaknesses
9.3 Eternal Materials Co., Ltd.
9.3.1 Eternal Materials Co., Ltd. Details
9.3.2 Eternal Materials Co., Ltd. Major Business
9.3.3 Eternal Materials Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
9.3.4 Eternal Materials Co., Ltd. Dry Film Solder Mask (DFSM) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Eternal Materials Co., Ltd. Recent Developments/Updates
9.3.6 Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
9.4 Hangzhou First Electronic Material Co., Ltd.
9.4.1 Hangzhou First Electronic Material Co., Ltd. Details
9.4.2 Hangzhou First Electronic Material Co., Ltd. Major Business
9.4.3 Hangzhou First Electronic Material Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
9.4.4 Hangzhou First Electronic Material Co., Ltd. Dry Film Solder Mask (DFSM) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Hangzhou First Electronic Material Co., Ltd. Recent Developments/Updates
9.4.6 Hangzhou First Electronic Material Co., Ltd. Competitive Strengths & Weaknesses
9.5 Taiyo America, Inc.
9.5.1 Taiyo America, Inc. Details
9.5.2 Taiyo America, Inc. Major Business
9.5.3 Taiyo America, Inc. Dry Film Solder Mask (DFSM) Product and Services
9.5.4 Taiyo America, Inc. Dry Film Solder Mask (DFSM) Production, Price, Value,

+357 96 030922
info@marketpublishers.com

Gross Margin and Market Share (2021-2026)
9.5.5 Taiyo America, Inc. Recent Developments/Updates
9.5.6 Taiyo America, Inc. Competitive Strengths & Weaknesses
9.6 TAIYO INK MFG. CO. (KOREA) LTD.
9.6.1 TAIYO INK MFG. CO. (KOREA) LTD. Details
9.6.2 TAIYO INK MFG. CO. (KOREA) LTD. Major Business
9.6.3 TAIYO INK MFG. CO. (KOREA) LTD. Dry Film Solder Mask (DFSM) Product and Services
9.6.4 TAIYO INK MFG. CO. (KOREA) LTD. Dry Film Solder Mask (DFSM) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 TAIYO INK MFG. CO. (KOREA) LTD. Recent Developments/Updates
9.6.6 TAIYO INK MFG. CO. (KOREA) LTD. Competitive Strengths & Weaknesses

**10 INDUSTRY CHAIN ANALYSIS**

10.1 Dry Film Solder Mask (DFSM) Industry Chain
10.2 Dry Film Solder Mask (DFSM) Upstream Analysis
10.2.1 Dry Film Solder Mask (DFSM) Core Raw Materials
10.2.2 Main Manufacturers of Dry Film Solder Mask (DFSM) Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Dry Film Solder Mask (DFSM) Production Mode
10.6 Dry Film Solder Mask (DFSM) Procurement Model
10.7 Dry Film Solder Mask (DFSM) Industry Sales Model and Sales Channels
10.7.1 Dry Film Solder Mask (DFSM) Sales Model
10.7.2 Dry Film Solder Mask (DFSM) Typical Distributors

**11 RESEARCH FINDINGS AND CONCLUSION**

**12 APPENDIX**

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

# List Of Tables

## LIST OF TABLES

Table 1. World Dry Film Solder Mask (DFSM) Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Dry Film Solder Mask (DFSM) Production Value by Region (2021-2026) & (USD Million)
Table 3. World Dry Film Solder Mask (DFSM) Production Value by Region (2027-2032) & (USD Million)
Table 4. World Dry Film Solder Mask (DFSM) Production Value Market Share by Region (2021-2026)
Table 5. World Dry Film Solder Mask (DFSM) Production Value Market Share by Region (2027-2032)
Table 6. World Dry Film Solder Mask (DFSM) Production by Region (2021-2026) & (K Sqm)
Table 7. World Dry Film Solder Mask (DFSM) Production by Region (2027-2032) & (K Sqm)
Table 8. World Dry Film Solder Mask (DFSM) Production Market Share by Region (2021-2026)
Table 9. World Dry Film Solder Mask (DFSM) Production Market Share by Region (2027-2032)
Table 10. World Dry Film Solder Mask (DFSM) Average Price by Region (2021-2026) & (US$/Sq m)
Table 11. World Dry Film Solder Mask (DFSM) Average Price by Region (2027-2032) & (US$/Sq m)
Table 12. Dry Film Solder Mask (DFSM) Major Market Trends
Table 13. World Dry Film Solder Mask (DFSM) Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Sqm)
Table 14. World Dry Film Solder Mask (DFSM) Consumption by Region (2021-2026) & (K Sqm)
Table 15. World Dry Film Solder Mask (DFSM) Consumption Forecast by Region (2027-2032) & (K Sqm)
Table 16. World Dry Film Solder Mask (DFSM) Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Dry Film Solder Mask (DFSM) Producers in 2025
Table 18. World Dry Film Solder Mask (DFSM) Production by Manufacturer (2021-2026) & (K Sqm)

+357 96 030922
info@marketpublishers.com

Table 19. Production Market Share of Key Dry Film Solder Mask (DFSM) Producers in 2025
Table 20. World Dry Film Solder Mask (DFSM) Average Price by Manufacturer (2021-2026) & (US$/Sq m)
Table 21. Global Dry Film Solder Mask (DFSM) Company Evaluation Quadrant
Table 22. World Dry Film Solder Mask (DFSM) Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Dry Film Solder Mask (DFSM) Production Site of Key Manufacturer
Table 24. Dry Film Solder Mask (DFSM) Market: Company Product Type Footprint
Table 25. Dry Film Solder Mask (DFSM) Market: Company Product Application Footprint
Table 26. Dry Film Solder Mask (DFSM) Competitive Factors
Table 27. Dry Film Solder Mask (DFSM) New Entrant and Capacity Expansion Plans
Table 28. Dry Film Solder Mask (DFSM) Mergers & Acquisitions Activity
Table 29. United States VS China Dry Film Solder Mask (DFSM) Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Dry Film Solder Mask (DFSM) Production Comparison, (2021 & 2025 & 2032) & (K Sqm)
Table 31. United States VS China Dry Film Solder Mask (DFSM) Consumption Comparison, (2021 & 2025 & 2032) & (K Sqm)
Table 32. United States Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Dry Film Solder Mask (DFSM) Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Dry Film Solder Mask (DFSM) Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Dry Film Solder Mask (DFSM) Production (2021-2026) & (K Sqm)
Table 36. United States Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share (2021-2026)
Table 37. China Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Dry Film Solder Mask (DFSM) Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Dry Film Solder Mask (DFSM) Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Dry Film Solder Mask (DFSM) Production, (2021-2026) & (K Sqm)

+357 96 030922
info@marketpublishers.com

Table 41. China Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share (2021-2026)
Table 42. Rest of World Based Dry Film Solder Mask (DFSM) Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production, (2021-2026) & (K Sqm)
Table 46. Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share (2021-2026)
Table 47. World Dry Film Solder Mask (DFSM) Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Dry Film Solder Mask (DFSM) Production by Type (2021-2026) & (K Sqm)
Table 49. World Dry Film Solder Mask (DFSM) Production by Type (2027-2032) & (K Sqm)
Table 50. World Dry Film Solder Mask (DFSM) Production Value by Type (2021-2026) & (USD Million)
Table 51. World Dry Film Solder Mask (DFSM) Production Value by Type (2027-2032) & (USD Million)
Table 52. World Dry Film Solder Mask (DFSM) Average Price by Type (2021-2026) & (US$/Sq m)
Table 53. World Dry Film Solder Mask (DFSM) Average Price by Type (2027-2032) & (US$/Sq m)
Table 54. World Dry Film Solder Mask (DFSM) Production Value by Color, (USD Million), 2021 & 2025 & 2032
Table 55. World Dry Film Solder Mask (DFSM) Production by Color (2021-2026) & (K Sqm)
Table 56. World Dry Film Solder Mask (DFSM) Production by Color (2027-2032) & (K Sqm)
Table 57. World Dry Film Solder Mask (DFSM) Production Value by Color (2021-2026) & (USD Million)
Table 58. World Dry Film Solder Mask (DFSM) Production Value by Color (2027-2032) & (USD Million)
Table 59. World Dry Film Solder Mask (DFSM) Average Price by Color (2021-2026) & (US$/Sq m)
Table 60. World Dry Film Solder Mask (DFSM) Average Price by Color (2027-2032) &

+357 96 030922
info@marketpublishers.com

(US$/Sq m)
Table 61. World Dry Film Solder Mask (DFSM) Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032
Table 62. World Dry Film Solder Mask (DFSM) Production by Sales Channel (2021-2026) & (K Sqm)
Table 63. World Dry Film Solder Mask (DFSM) Production by Sales Channel (2027-2032) & (K Sqm)
Table 64. World Dry Film Solder Mask (DFSM) Production Value by Sales Channel (2021-2026) & (USD Million)
Table 65. World Dry Film Solder Mask (DFSM) Production Value by Sales Channel (2027-2032) & (USD Million)
Table 66. World Dry Film Solder Mask (DFSM) Average Price by Sales Channel (2021-2026) & (US$/Sq m)
Table 67. World Dry Film Solder Mask (DFSM) Average Price by Sales Channel (2027-2032) & (US$/Sq m)
Table 68. World Dry Film Solder Mask (DFSM) Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Dry Film Solder Mask (DFSM) Production by Application (2021-2026) & (K Sqm)
Table 70. World Dry Film Solder Mask (DFSM) Production by Application (2027-2032) & (K Sqm)
Table 71. World Dry Film Solder Mask (DFSM) Production Value by Application (2021-2026) & (USD Million)
Table 72. World Dry Film Solder Mask (DFSM) Production Value by Application (2027-2032) & (USD Million)
Table 73. World Dry Film Solder Mask (DFSM) Average Price by Application (2021-2026) & (US$/Sq m)
Table 74. World Dry Film Solder Mask (DFSM) Average Price by Application (2027-2032) & (US$/Sq m)
Table 75. Taiyo Holdings Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 76. Taiyo Holdings Co., Ltd. Major Business
Table 77. Taiyo Holdings Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
Table 78. Taiyo Holdings Co., Ltd. Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Taiyo Holdings Co., Ltd. Recent Developments/Updates
Table 80. Taiyo Holdings Co., Ltd. Competitive Strengths & Weaknesses
Table 81. Resonac Corporation Basic Information, Manufacturing Base and Competitors

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Table 82. Resonac Corporation Major Business
Table 83. Resonac Corporation Dry Film Solder Mask (DFSM) Product and Services
Table 84. Resonac Corporation Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Resonac Corporation Recent Developments/Updates
Table 86. Resonac Corporation Competitive Strengths & Weaknesses
Table 87. Eternal Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 88. Eternal Materials Co., Ltd. Major Business
Table 89. Eternal Materials Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
Table 90. Eternal Materials Co., Ltd. Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Eternal Materials Co., Ltd. Recent Developments/Updates
Table 92. Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
Table 93. Hangzhou First Electronic Material Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 94. Hangzhou First Electronic Material Co., Ltd. Major Business
Table 95. Hangzhou First Electronic Material Co., Ltd. Dry Film Solder Mask (DFSM) Product and Services
Table 96. Hangzhou First Electronic Material Co., Ltd. Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Hangzhou First Electronic Material Co., Ltd. Recent Developments/Updates
Table 98. Hangzhou First Electronic Material Co., Ltd. Competitive Strengths & Weaknesses
Table 99. Taiyo America, Inc. Basic Information, Manufacturing Base and Competitors
Table 100. Taiyo America, Inc. Major Business
Table 101. Taiyo America, Inc. Dry Film Solder Mask (DFSM) Product and Services
Table 102. Taiyo America, Inc. Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Taiyo America, Inc. Recent Developments/Updates
Table 104. Taiyo America, Inc. Competitive Strengths & Weaknesses
Table 105. TAIYO INK MFG. CO. (KOREA) LTD. Basic Information, Manufacturing Base and Competitors
Table 106. TAIYO INK MFG. CO. (KOREA) LTD. Major Business

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Table 107. TAIYO INK MFG. CO. (KOREA) LTD. Dry Film Solder Mask (DFSM) Product and Services
Table 108. TAIYO INK MFG. CO. (KOREA) LTD. Dry Film Solder Mask (DFSM) Production (K Sqm), Price (US$/Sq m), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. TAIYO INK MFG. CO. (KOREA) LTD. Recent Developments/Updates
Table 110. TAIYO INK MFG. CO. (KOREA) LTD. Competitive Strengths & Weaknesses
Table 111. Global Key Players of Dry Film Solder Mask (DFSM) Upstream (Raw Materials)
Table 112. Global Dry Film Solder Mask (DFSM) Typical Customers
Table 113. Dry Film Solder Mask (DFSM) Typical Distributors

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# List Of Figures

## LIST OF FIGURES

Figure 1. Dry Film Solder Mask (DFSM) Picture
Figure 2. World Dry Film Solder Mask (DFSM) Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Dry Film Solder Mask (DFSM) Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Dry Film Solder Mask (DFSM) Production (2021-2032) & (K Sqm)
Figure 5. World Dry Film Solder Mask (DFSM) Average Price (2021-2032) & (US$/Sq m)
Figure 6. World Dry Film Solder Mask (DFSM) Production Value Market Share by Region (2021-2032)
Figure 7. World Dry Film Solder Mask (DFSM) Production Market Share by Region (2021-2032)
Figure 8. North America Dry Film Solder Mask (DFSM) Production (2021-2032) & (K Sqm)
Figure 9. China Dry Film Solder Mask (DFSM) Production (2021-2032) & (K Sqm)
Figure 10. Japan Dry Film Solder Mask (DFSM) Production (2021-2032) & (K Sqm)
Figure 11. China Taiwan Dry Film Solder Mask (DFSM) Production (2021-2032) & (K Sqm)
Figure 12. Dry Film Solder Mask (DFSM) Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 15. World Dry Film Solder Mask (DFSM) Consumption Market Share by Region (2021-2032)
Figure 16. United States Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 17. China Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 18. Europe Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 19. Japan Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 20. South Korea Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 21. ASEAN Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 22. India Dry Film Solder Mask (DFSM) Consumption (2021-2032) & (K Sqm)
Figure 23. Producer Shipments of Dry Film Solder Mask (DFSM) by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Dry Film Solder Mask

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(DFSM) Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Dry Film Solder Mask (DFSM) Markets in 2025
Figure 26. United States VS China: Dry Film Solder Mask (DFSM) Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Dry Film Solder Mask (DFSM) Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Dry Film Solder Mask (DFSM) Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share 2025
Figure 30. China Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Dry Film Solder Mask (DFSM) Production Market Share 2025
Figure 32. World Dry Film Solder Mask (DFSM) Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Dry Film Solder Mask (DFSM) Production Value Market Share by Type in 2025
Figure 34. Thin Dry Film (100 ?m)
Figure 37. World Dry Film Solder Mask (DFSM) Production Market Share by Type (2021-2032)
Figure 38. World Dry Film Solder Mask (DFSM) Production Value Market Share by Type (2021-2032)
Figure 39. World Dry Film Solder Mask (DFSM) Average Price by Type (2021-2032) & (US$/Sq m)
Figure 40. World Dry Film Solder Mask (DFSM) Production Value by Color, (USD Million), 2021 & 2025 & 2032
Figure 41. World Dry Film Solder Mask (DFSM) Production Value Market Share by Color in 2025
Figure 42. Green Dry Film Solder Mask
Figure 43. Transparent and Amber Dry Film Solder Mask
Figure 44. Others
Figure 45. World Dry Film Solder Mask (DFSM) Production Market Share by Color (2021-2032)
Figure 46. World Dry Film Solder Mask (DFSM) Production Value Market Share by Color (2021-2032)
Figure 47. World Dry Film Solder Mask (DFSM) Average Price by Color (2021-2032) & (US$/Sq m)

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Figure 48. World Dry Film Solder Mask (DFSM) Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032
Figure 49. World Dry Film Solder Mask (DFSM) Production Value Market Share by Sales Channel in 2025
Figure 50. Direct Sales
Figure 51. Indirect Sales
Figure 52. World Dry Film Solder Mask (DFSM) Production Market Share by Sales Channel (2021-2032)
Figure 53. World Dry Film Solder Mask (DFSM) Production Value Market Share by Sales Channel (2021-2032)
Figure 54. World Dry Film Solder Mask (DFSM) Average Price by Sales Channel (2021-2032) & (US$/Sq m)
Figure 55. World Dry Film Solder Mask (DFSM) Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 56. World Dry Film Solder Mask (DFSM) Production Value Market Share by Application in 2025
Figure 57. PCB
Figure 58. Semiconductor Packaging
Figure 59. Other
Figure 60. World Dry Film Solder Mask (DFSM) Production Market Share by Application (2021-2032)
Figure 61. World Dry Film Solder Mask (DFSM) Production Value Market Share by Application (2021-2032)
Figure 62. World Dry Film Solder Mask (DFSM) Average Price by Application (2021-2032) & (US$/Sq m)
Figure 63. Dry Film Solder Mask (DFSM) Industry Chain
Figure 64. Dry Film Solder Mask (DFSM) Procurement Model
Figure 65. Dry Film Solder Mask (DFSM) Sales Model
Figure 66. Dry Film Solder Mask (DFSM) Sales Channels, Direct Sales, and Distribution
Figure 67. Methodology
Figure 68. Research Process and Data Source

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