

Global IC Photoresist Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global IC Photoresist market size is expected to reach \$ 5255 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032). Photoresist is a chemical essential for semiconductor manufacturing. The photoresists known as a photosensitive material, initiate a chemical reaction in the light. It is a chemical that plays an essential role in photolithography, a technology that is involved in the manufacture of semiconductor devices. In the semiconductor manufacturing, the exposure process that a photoengraving technique is applied to reduce and transfer the design drawn on the original plate (photomask) onto the silicon chip. To create power-saving, high-performance semiconductors, the circuits that are to be transferred need to be rendered smaller.

Structurally, the mix in 2025 is still DUV-dominated: ArFi (~26.1%) + KrF (~25.5%) + g/i-Line (~24.6%) ? 76% of total value, reflecting the reality that even in leading-edge flows, EUV is used for the most intricate layers while many remaining layers continue to be patterned with DUV, and both platforms run in parallel for years. Within DUV, ArFi?s weight is also consistent with technology boundaries: for many ?mainstream-to-advanced mature? nodes, immersion ArF remains a foundational lithography capability. Meanwhile, EUV photoresists are the clear growth engine (rising from ~\$80M to ~\$374M from 2020 to 2025; fastest growth rate among your segments), but still only ~11.2% of the 2025 total?i.e., EUV is driving the growth, while DUV still carries the volume and breadth of layers.

Looking forward over the next few years, the direction is: EUV grows fastest; ArFi stays resilient; KrF and g/i-Line remain stable-to-slight growth; ArF Dry grows modestly; E-beam grows steadily but niche?each for different ?real-fab? reasons. EUV resists should keep outgrowing the market because EUV layer counts and EUV exposure intensity rise with continued scaling, and the ecosystem is now also entering the High-NA EUV era (tool milestones such as acceptance testing and High-NA platform ramp

are now public), which tightens resist requirements and pulls more innovation spend into EUV materials (stochastics/roughness/sensitivity tradeoffs, outgassing control, etc.). ArFi resists are likely to remain the "workhorse premium DUV" category: even where EUV expands, ArFi continues to print many non-EUV layers and supports huge installed bases at 28/22/16/14nm-class and below, and a lot of capacity being added globally is still in ranges that rely on ArFi capability. ArF Dry typically tracks a broad swath of mature logic and specialty IC production, so expect low-to-mid single-digit growth driven more by wafer-start expansion and mix (specialty, analog, PMIC, CIS, etc.) than by "node shrinks." KrF should stay solid because it sits in the cost/performance sweet spot for many mature nodes and selected tighter-pattern layers where ArF isn't required; its main driver is mature-node capacity + automotive/industrial stability, with cyclicalty tied to overall wafer starts. g/i-Line is "sticky" for thick resist and back-end / packaging-centric lithography, so advanced packaging scaling (more RDL layers, bumping/plating processes, wafer-/panel-level packaging) tends to underpin demand even when leading-edge front-end is soft; suppliers explicitly position g/i-line portfolios around thick-film variants and packaging-related patterning use-cases (including RDL). E-beam resists should grow steadily (but remain small) because advanced mask making?especially EUV masks?depends heavily on e-beam lithography resist performance, and mask complexity rises as design rules tighten. Macro-wise, a supportive tailwind for all categories is the expectation that wafer-fab investment and capacity expansion are lifted by AI-driven logic and memory demand into 2026-2027, which typically flows through into lithography materials consumption with a lag. This report studies the global IC Photoresist production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global IC Photoresist total production and demand, 2021-2032, (K Gallon)

Global IC Photoresist total production value, 2021-2032, (USD Million)

Global IC Photoresist production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon), (based on production site)

Global IC Photoresist consumption by region & country, CAGR, 2021-2032 & (K Gallon)

U.S. VS China: IC Photoresist domestic production, consumption, key domestic manufacturers and share

Global IC Photoresist production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Gallon)

Global IC Photoresist production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)

Global IC Photoresist production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)

This report profiles key players in the global IC Photoresist 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 TOKYO OHKA KOGYO CO., LTD. (TOK), JSR, Shin-Etsu Chemical, DuPont, Fujifilm, Sumitomo Chemical, Dongjin Semichem, Merck KGaA (AZ), Allresist GmbH, Futurrex, 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 IC Photoresist market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Gallon) and average price (USD/Gallon) 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 IC Photoresist Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IC Photoresist Market, Segmentation by Type:

EUV Photoresist

ArFi Photoresist

ArF Dry Photoresist

KrF Photoresist

g/i-Line

Others

Global IC Photoresist Market, Segmentation by Imaging Mechanism:

Positive Photoresists

Negative Photoresists

Global IC Photoresist Market, Segmentation by Process Node:

High End / Advanced 110nm

DRAM and NAND

Global IC Photoresist Market, Segmentation by Application:

IC Manufacturing

Advanced Packaging

Companies Profiled:

TOKYO OHKA KOGYO CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

DuPont

Fujifilm

Sumitomo Chemical

Dongjin Semichem

Merck KGaA (AZ)

Allresist GmbH

Futurrex

KemLab? Inc

YCCHEM Co., Ltd

SK Materials Performance (SKMP)

Everlight Chemical

Red Avenue

Crystal Clear Electronic Material

Xuzhou B & C Chemical

Xiamen Hengkun New Material Technology

Jiangsu Aisen Semiconductor Material

Zhuhai Cornerstone Technologies

Shanghai Sinyang Semiconductor Materials

ShenZhen RongDa Photosensitive Science & Technology

SINEVA

Guoke Tianji

Jiangsu Nata Opto-electronic Material

PhiChem

Key Questions Answered:

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

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