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Global Negative Dry Film Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Negative Dry Film market size is expected to reach $ 1251 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

Negative Dry Film is a dry-film type photosensitive material composed of polymer resins, photoinitiators, reactive monomers, additives, and carrier films, typically supplied in roll or sheet form. During application, the film is laminated onto a substrate and processed through exposure and development to create patterned structures. Its defining feature is that the exposed areas undergo photochemical crosslinking, curing, or reduced solubility under ultraviolet light or a specific wavelength light source, allowing the exposed regions to remain after development while the unexposed regions are removed. Negative dry films are mainly used for circuit pattern transfer, electroplating masks, etching masks, solder mask protection, precision processing, and certain microstructure-forming applications. They are widely applied in printed circuit boards, IC substrates, lead frames, electronic materials, precision etching, solder mask formation, and research and development.

In 2025, global Negative Dry Film production reached approximately 1085 million Sqm, with an average global market price of around US$ 844 per k Sqm

The upstream raw materials of Negative Dry Film mainly include acrylic resins, epoxy resins, alkali-soluble binders, photopolymerizable monomers, oligomers, photoinitiators, sensitizers, dyes, inhibitors, adhesion promoters, plasticizers, solvents, polyethylene terephthalate carrier film and polyethylene protective film. Representative upstream suppliers include Mitsubishi Chemical Group, Kuraray, Arkema, BASF, etc.

The downstream applications of Negative Dry Film mainly include PCB, Semiconductor

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Packaging and Others. Representative downstream customers include Zhen Ding Technology, Unimicron, Compeq, Tripod Technology, TTM Technologies, etc.

The gross margin of Negative Dry Film varies by film thickness, application field, customer qualification level and product performance grade. Typical gross margins is about 25%?50%.

By product type, Negative Dry Film can be divided into Ultra-thin Dry Film, Thin Dry Film, Standard Dry Film and Thick Dry Film. Ultra-thin Dry Film refers to products with a thickness of ?15 ?m and is mainly used in fine-line, high-density interconnect, IC substrate and advanced packaging applications where high-resolution patterning, coating uniformity, low defectivity, low residue and tight line-width control are required. Thin Dry Film refers to products with a thickness of 15?50 ?m and is an important product range for fine-line printed circuit boards, high-density interconnect boards, flexible boards and selected package substrates, balancing resolution, adhesion, development latitude and production efficiency. Standard Dry Film refers to products with a thickness of 50?100 ?m and is suitable for conventional circuit imaging, etching resistance, pattern plating and tenting processes, representing a mature and broadly used thickness range. Thick Dry Film refers to products with a thickness of >100 ?m and is mainly used in thick plating, copper pillars, micro-bumps, high-aspect-ratio structures, microstructure fabrication and selected specialty packaging applications, where thickness stability, sidewall profile, plating resistance and stripping performance are more demanding.

By application, PCB is the largest and most established application area for Negative Dry Film. In this field, the material is used for circuit imaging, etching resistance, pattern plating and tenting in rigid boards, flexible boards, rigid-flex boards, high-density interconnect boards and multilayer boards, with strong requirements for cost control, yield, lamination stability, development window and lot-to-lot consistency. Semiconductor Packaging is the most technology-driven application area, where Negative Dry Film is used in IC substrates, redistribution layers, copper pillars, micro-bumps, fan-out packaging and other advanced packaging structures. This segment requires finer resolution, lower defect density, lower metal contamination, thicker film formation, stronger plating resistance and higher reliability.

Market Driving Factors are mainly supported by the increasing density and miniaturization of electronic products, which create stronger demand for fine-line patterning materials; the transition of printed circuit boards toward high-density interconnect, multilayer, flexible and high-reliability structures, which continuously

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increases the consumption of stable pattern transfer materials; the development of semiconductor packaging technologies such as advanced packaging, fan-out packaging, redistribution layers, copper pillars and micro-bumps, which drives demand for ultra-thin, thin and thick high-end negative dry films; the growth of artificial intelligence servers, high-performance computing, automotive electronics, new energy vehicles, communications equipment and premium consumer electronics, which expands demand for high-end circuit boards and package substrates; the adoption of laser direct imaging, stepper exposure, automated lamination and continuous production processes, which raises requirements for photosensitivity, film thickness consistency and lot stability; the increasing focus on yield improvement, low defectivity, environmentally responsible processing and supply chain stability, which supports the replacement of low-end materials with high-quality Negative Dry Film; and the localization of electronic materials and regional supply chain restructuring, which create entry opportunities for domestic suppliers in mid- to high-end customer systems.

Market Restraints mainly include the high technical barriers in high-end Negative Dry Film formulation, as resin chemistry, photoinitiator systems, monomer balance, adhesion control, development latitude, stripping performance and defect control require long-term process know-how; long customer qualification cycles, especially in IC substrate and semiconductor packaging applications where materials must pass strict reliability, cleanliness, line-width control and mass-production stability validation; raw material price fluctuations in resins, photoinitiators, functional monomers, carrier films and protective films, which can affect production costs and gross margins; mature competition in standard dry films for general printed circuit boards, where price pressure may limit profitability in lower-end product grades; higher requirements for precision coating, cleanroom control, film thickness uniformity and process matching in ultra-thin and thick dry films, which increase research and quality-management costs; and cyclical fluctuations in consumer electronics, servers, automotive electronics and semiconductor capital expenditure, which can affect downstream order timing and create inventory volatility and short-term demand uncertainty.

This report studies the global Negative Dry Film production, demand, key manufacturers, and key regions.

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

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Highlights and key features of the study
Global Negative Dry Film total production and demand, 2021-2032, (million Sqm)
Global Negative Dry Film total production value, 2021-2032, (USD Million)
Global Negative Dry Film production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm), (based on production site)
Global Negative Dry Film consumption by region & country, CAGR, 2021-2032 & (million Sqm)
U.S. VS China: Negative Dry Film domestic production, consumption, key domestic manufacturers and share
Global Negative Dry Film production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (million Sqm)
Global Negative Dry Film production by Type, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)
Global Negative Dry Film production by Application, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)

This report profiles key players in the global Negative Dry Film 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), Chang Chun Group, Kolon Industries, 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 Negative Dry Film market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (million Sqm) and average price (USD/K 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.

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Global Negative Dry Film Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Negative Dry Film Market, Segmentation by Type:

Ultra-thin Dry Film (?15 ?m)

Thin Dry Film (15?50 ?m)

Standard Dry Film (50?100 ?m)

Thick Dry Film (>100 ?m)

Global Negative Dry Film Market, Segmentation by Development Method:

Aqueous-developable

Solvent-developable

Global Negative Dry Film Market, Segmentation by Sales Channel:

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Direct Sales

Indirect Sales

Global Negative Dry Film Market, Segmentation by Application:

Printed Circuit Board

Semiconductor Packaging

Other

Companies Profiled:

Asahi Kasei Corporation

Eternal Materials

Resonac Corporation (Showa Denko Materials)

Qnity Electronics (DuPont Riston)

Chang Chun Group

Kolon Industries

Hunan Initial New Materials

Nagase ChemteX America

Nippon Kayaku

Key Questions Answered:
1. How big is the global Negative Dry Film market?
2. What is the demand of the global Negative Dry Film market?
3. What is the year over year growth of the global Negative Dry Film market?

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4. What is the production and production value of the global Negative Dry Film market?
5. Who are the key producers in the global Negative Dry Film market?
6. What are the growth factors driving the market demand?

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