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Global Nonionic PAG Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Nonionic PAG market size was valued at US$ 149 million in 2025 and is forecast to a readjusted size of US$ 228 million by 2032 with a CAGR of 6.2% during review period.

Non-ionic photoacid generators are neutral organic compounds that generate acidic species upon exposure to ultraviolet light, deep ultraviolet radiation, electron beams, or other high-energy irradiation through intramolecular photolysis, bond cleavage, or rearrangement reactions. This study focuses on non-ionic PAG active ingredients used in chemically amplified photoresists, display photoresists, advanced packaging lithography materials, cationic UV-curable formulations, and micro/nano-patterning systems. Representative chemistries include imidosulfonates, oxime sulfonates, sulfonate esters, trichloromethyl triazines, naphthalimide sulfonates, and selected bis-sulfonyldiazomethane-type compounds. Their core function is to release controlled acidic species at designed exposure wavelengths, enabling deprotection, crosslinking, epoxy ring-opening polymerization, or solubility switching in polymer matrices.

Based on our research, non-ionic photoacid generators represent a small but strategically important functional materials segment rather than a commodity chemical market. Their value lies in molecular-level design that balances exposure response, acid generation efficiency, solubility, diffusion control, metal impurity control, and compatibility with polymer matrices. Compared with ionic onium PAGs, non-ionic PAGs often offer better solubility and matrix compatibility, while generally facing constraints in thermal stability, acid strength, and applicability to the most advanced lithography nodes. As a result, their current commercial demand is more concentrated in i-line, selected KrF formulations, display and advanced packaging photoresists, research-scale micro/nano-patterning, and cationic UV-curable systems. In ArF and EUV

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lithography, non-ionic PAGs are better viewed as a complementary formulation route, a diffusion-control option, or a long-term alternative chemistry rather than a universal replacement for mainstream ionic PAG technologies.

From a supply perspective, the global industry is concentrated in a limited number of electronic chemical suppliers with strong synthesis, purification, and customer co-development capabilities. Japan remains the most visible supplier base, with San-Apro, Toyo Gosei, Midori Kagaku, FUJIFILM Wako, TCI, and Nippon Carbide/Sanwa forming the core pool of publicly verifiable suppliers. Europe and the United States are represented by Heraeus, Merck, Hampford, IGM Resins, and Arkema, with different emphases across semiconductor-grade PAGs, research reagents, custom synthesis, and industrial UV-curing photoinitiators. Korea?s ENF Technology and China?s Changzhou Tronly reflect regional supply-chain localization.

Demand growth is driven by three forces: the continued use of high-solubility PAGs in display, advanced packaging, PCB, i-line and KrF-related materials; the localization and multi-sourcing of photoresist raw materials in Asia; and long-term R&D into PFAS-free or lower-PFAS lithography chemistries. Public semiconductor industry materials indicate that PAGs are deeply linked to photoresist performance and that replacing incumbent PFAS-containing PAG systems requires extensive reformulation and customer qualification. This creates a structural opportunity for non-ionic and alternative PAG chemistries, but it also limits near-term market acceleration because new molecules must meet stringent process windows, yield requirements, and customer-specific qualification standards.

This report is a detailed and comprehensive analysis for global Nonionic PAG market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Nonionic PAG market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Nonionic PAG market size and forecasts by region and country, in consumption

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value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Nonionic PAG market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Nonionic PAG market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Nonionic PAG

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Nonionic PAG market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include San-Apro Ltd., Toyo Gosei Co., Ltd., Midori Kagaku Co., Ltd., Heraeus Epurio, Merck KGaA, FUJIFILM Wako Pure Chemical Corp., Tokyo Chemical Industry Co., Ltd., ENF Technology Co., Ltd., Changzhou Tronly New Electronic Materials Co., Ltd., Chembridge International Corp., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Nonionic PAG market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

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Market segment by Type

- i-line / g-line Compatible
- KrF Compatible
- ArF / EUV Research Grade
- Broadband UV / LED

Market segment by Chemistry

- Imidosulfonates
- Oxime Sulfonates
- Sulfonate Esters
- Trichloromethyl Triazines
- Diazomethane / Diazosulfone Type

Market segment by Acid Type Generated

- Sulfonic Acid Generating PAGs
- Halogenated Acid Generating PAGs
- Strong Organic Acid Generating PAGs
- Weak / Moderate Acid Generating PAGs

Market segment by Application

- Semiconductor Photoresist

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Display Photoresist

Advanced Packaging

UV Curing / Cationic Polymerization

Major players covered

San-Apro Ltd.

Toyo Gosei Co., Ltd.

Midori Kagaku Co., Ltd.

Heraeus Epurio

Merck KGaA

FUJIFILM Wako Pure Chemical Corp.

Tokyo Chemical Industry Co., Ltd.

ENF Technology Co., Ltd.

Changzhou Tronly New Electronic Materials Co., Ltd.

Chembridge International Corp., Ltd.

Nippon Carbide Industries

MP Gokyo Food & Chemical Co., Ltd.

Hampford Research Inc.

IGM Resins B.V.

Arkema

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Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Nonionic PAG product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Nonionic PAG, with price, sales quantity, revenue, and global market share of Nonionic PAG from 2021 to 2026.

Chapter 3, the Nonionic PAG competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Nonionic PAG breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Nonionic PAG market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

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Chapter 13, the key raw materials and key suppliers, and industry chain of Nonionic PAG.

Chapter 14 and 15, to describe Nonionic PAG sales channel, distributors, customers, research findings and conclusion.

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