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Global Nonionic PAG Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G4338B8C0248EN.html
Date: August 2026
Pages: 116
Price: US$ 4,480.00 (Single User License)
ID: G4338B8C0248EN

Abstracts

The global Nonionic PAG market size is expected to reach $ 228 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

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 lithography, non-ionic PAGs are better viewed as a complementary formulation route, a

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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 studies the global Nonionic PAG production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study
Global Nonionic PAG total production and demand, 2021-2032, (Tons)
Global Nonionic PAG total production value, 2021-2032, (USD Million)
Global Nonionic PAG production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Nonionic PAG consumption by region & country, CAGR, 2021-2032 & (Tons)

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U.S. VS China: Nonionic PAG domestic production, consumption, key domestic manufacturers and share
Global Nonionic PAG production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Nonionic PAG production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Nonionic PAG production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Nonionic PAG 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Nonionic PAG market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) 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 Nonionic PAG Market, By Region:

United States

China

Europe

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Japan

South Korea

ASEAN

India

Rest of World

Global Nonionic PAG Market, Segmentation by Type:

i-line / g-line Compatible

KrF Compatible

ArF / EUV Research Grade

Broadband UV / LED

Global Nonionic PAG Market, Segmentation by Chemistry:

Imidosulfonates

Oxime Sulfonates

Sulfonate Esters

Trichloromethyl Triazines

Diazomethane / Diazosulfone Type

Global Nonionic PAG Market, Segmentation by Acid Type Generated:

Sulfonic Acid Generating PAGs

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Halogenated Acid Generating PAGs

Strong Organic Acid Generating PAGs

Weak / Moderate Acid Generating PAGs

Global Nonionic PAG Market, Segmentation by Application:

Semiconductor Photoresist

Display Photoresist

Advanced Packaging

UV Curing / Cationic Polymerization

Companies Profiled:

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.

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Nippon Carbide Industries

MP Gokyo Food & Chemical Co., Ltd.

Hampford Research Inc.

IGM Resins B.V.

Arkema

Key Questions Answered:
1. How big is the global Nonionic PAG market?
2. What is the demand of the global Nonionic PAG market?
3. What is the year over year growth of the global Nonionic PAG market?
4. What is the production and production value of the global Nonionic PAG market?
5. Who are the key producers in the global Nonionic PAG market?
6. What are the growth factors driving the market demand?

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