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Global PBO Precursor Photoresist 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 PBO Precursor Photoresist market size was valued at US$ 370 million in 2025 and is forecast to a readjusted size of US$ 642 million by 2032 with a CAGR of 8.1% during review period.

PBO precursor photoresist refers to a photosensitive dielectric material formed by adding photosensitizers, crosslinking agents, solvents, adhesion promoters, leveling agents, and other functional additives to a polybenzoxazole precursor resin as the main body. After exposure and development, it is transformed into a polybenzoxazole structure through a thermal curing reaction. This material combines photolithography patterning and encapsulation dielectric insulation functions, and can form openings, patterned insulation layers, buffer protection layers, and RDL rewiring layer dielectric layers on the wafer surface. It is widely used in wafer level packaging, fan out packaging, bumping, Chiplet packaging, display driver chip packaging, sensor packaging, and high reliability power device packaging. Compared with ordinary non photosensitive PBO resin, PBO precursor photoresist can directly achieve fine patterns through photolithography process without the need for additional dry etching; Compared with PSPI materials, PBO typically has lower moisture absorption, better heat resistance, mechanical strength, and packaging reliability, making it suitable for advanced packaging scenarios that require high requirements for low stress, low defects, dielectric properties, and long-term reliability. In 2025, global PBO Precursor Photoresist production reached approximately 1,235 MT, with an average global market price of around US$ 291.35 per kg.The annual production capacity of PBO precursor photoresist is 2,000 tons, with a gross profit margin of about 45%.

The upstream mainly includes PBO precursor resins, aromatic diamines, diacid or acyl

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chloride monomers, photosensitizers, photoacid or photobase generators, crosslinking agents, high-purity solvents, leveling agents, adhesion promoters, development regulators, metal ion removal materials, microporous filtration membranes, clean packaging barrels, ultra clean filling equipment, photolithography evaluation equipment, and reliability testing equipment.

The downstream mainly targets wafer level packaging, fanout packaging, RDL rewiring, bumping, Chiplet packaging, display driver ICs, CMOS image sensors MEMS? Power device packaging, automotive grade chip packaging, and high reliability electronic packaging.

PBO precursor resin and key monomers account for about 30% to 42% of the total cost, photosensitizers, crosslinkers, additives, and high-purity solvents account for about 18% to 28%, clean filtration, metal ion control, filling, and packaging account for about 8% to 14%, research and development verification, photolithography evaluation, reliability testing, and customer certification account for about 10% to 18%, clean production, equipment depreciation, yield loss, and quality management account for about 8% to 15%, and sales technical services and supply chain management account for about 5% to 10%.

PBO precursor photoresist is a key high-end category in advanced packaging material systems, and its market demand is mainly driven by wafer level packaging, fanout packaging, RDL multi-layer rewiring, Chiplet heterogeneous integration, display driver IC, and automotive chip packaging upgrades. With the development of packaging structures towards high-density interconnection, thin line width, multi-layer dielectric, low warpage, and high reliability, packaging dielectric materials are no longer just simple insulation layers, but need to simultaneously meet comprehensive requirements such as exposure and development window, film thickness uniformity, low curing shrinkage, copper adhesion, low moisture absorption, heat-resistant cycling, low metal ions, and low defect control. Therefore, PBO precursor photoresist has a high technical threshold and customer certification barriers. The future industry competition will focus on positive water-based development systems, low-temperature curing, low dielectric loss, high resolution, thick film uniform coating, PFAS free environmentally friendly formulas, compatibility with copper RDL processes, and accumulation of packaging reliability data. In the short term, international material companies still have a first mover advantage, while domestic companies need to continue to break through in PBO resin synthesis, photosensitive formulation, clean filtration, batch stability, and packaging factory validation; In the medium to long term, the localization of advanced packaging, AI chip packaging, high reliability packaging of automotive grade chips, and demand for

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display driver packaging will provide opportunities for the continuous growth of PBO precursor photoresist tape. The customer stickiness and replacement costs of high-end products will remain strong.

This report is a detailed and comprehensive analysis for global PBO Precursor Photoresist 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 PBO Precursor Photoresist market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Kg), 2021-2032

Global PBO Precursor Photoresist market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Kg), 2021-2032

Global PBO Precursor Photoresist market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Kg), 2021-2032

Global PBO Precursor Photoresist market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/Kg), 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 PBO Precursor Photoresist

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

To assess competitive factors affecting the marketplace

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This report profiles key players in the global PBO Precursor Photoresist 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 FUJIFILM, Microcosm Technology, HD MicroSystems, Asahi Kasei Corporation, MINSEOA Advanced Materials, etc.

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

Market Segmentation

PBO Precursor Photoresist 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.

Market segment by Type

Positivity

Negative

Market segment by Cure Temperature

Low-Temperature Curing

High Temperature Curing

Market segment by Application

Semiconductor Wafer Manufacturing

Advanced Packaging

Other

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Major players covered

FUJIFILM

Microcosm Technology

HD MicroSystems

Asahi Kasei Corporation

MINSEOA Advanced Materials

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 PBO Precursor Photoresist product scope, market overview, market estimation caveats and base year.

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

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

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Chapter 4, the PBO Precursor Photoresist 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 PBO Precursor Photoresist 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.

Chapter 13, the key raw materials and key suppliers, and industry chain of PBO Precursor Photoresist.

Chapter 14 and 15, to describe PBO Precursor Photoresist sales channel, distributors, customers, research findings and conclusion.

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