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Global PCB Negative Dry Film 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 PCB Negative Dry Film market size was valued at US$ 686 million in 2025 and is forecast to a readjusted size of US$ 897 million by 2032 with a CAGR of 3.8% during review period.

PCB Negative Dry Film refers to negative-working photosensitive dry film materials used in printed circuit board manufacturing, covering dry film photoresist, dry film solder mask, and other negative photosensitive dry film materials. These products are typically composed of photosensitive resins, photoinitiators, reactive monomers, additives, carrier films, and protective films, and are supplied in roll or sheet form. The core processing mechanism is that, after lamination, exposure, and development, the exposed areas undergo photochemical crosslinking, curing, or reduced solubility and remain after development, while the unexposed areas are removed by the developer. This process forms circuit patterns, etching or plating resist patterns, solder mask openings, or other functional patterned structures. In the printed circuit board industry, negative dry film can be used as a temporary pattern-transfer material for etching, electroplating, and circuit imaging, or as a permanent protective material for solder mask formation. Therefore, it is a critical base material for Consumer Electronics, Automotive, Communication Equipment, and other electronic manufacturing sectors.

In 2025, global PCB Negative Dry Film production reached approximately 794 million Sqm, with an average global market price of around US$ 840 per k Sqm

The upstream raw materials of PCB Negative Dry Film mainly include acrylic resins, epoxy resins, alkali-soluble binders, photopolymerizable monomers, oligomers, photoinitiators, sensitizers, dyes, inhibitors, adhesion promoters, plasticizers, solvents,

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polyethylene terephthalate carrier film and polyethylene protective film. Representative upstream suppliers include Mitsubishi Chemical Group, Kuraray, Arkema, BASF, etc.

The downstream applications of PCB Negative Dry Film include Consumer Electronics, Automotive, Communication Equipment and Others. Representative downstream customers include Zhen Ding Technology, Flexium Interconnect, Compeq, Tripod Technology, Unimicron, etc.

The gross margin of PCB 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, PCB Negative Dry Film can be classified into Ultra-thin Dry Film (?15 ?m), Thin Dry Film (15?50 ?m), Standard Dry Film (50?100 ?m), and Thick Dry Film (>100 ?m). Ultra-thin Dry Film with a thickness of ?15 ?m is mainly used in ultra-fine lines, high-density interconnect boards, IC substrates, fine-pitch patterns, and high-end electronic material processing, where coating uniformity, exposure sensitivity, resolution, development latitude, and low defect rates are essential. Thin Dry Film with a thickness of 15?50 ?m is widely used in advanced and mid-to-high-end PCB manufacturing, including multilayer boards, flexible circuits, rigid-flex boards, fine-line PCBs, and high-reliability electronic products, offering a balanced performance profile across resolution, resist protection, adhesion, and mass-production stability. Standard Dry Film with a thickness of 50?100 ?m is mainly used in conventional PCBs, industrial control boards, general multilayer boards, and larger-line-width patterning, with strong process adaptability, cost efficiency, and stable production performance. Thick Dry Film with a thickness of >100 ?m is mainly used in thick copper circuits, electroplating build-up, deep etching, special solder mask structures, thicker protective layers, and high-reliability functional patterning, requiring stronger adhesion, plating resistance, edge retention, residue control, and thick-film process stability.

By application, PCB Negative Dry Film is mainly used in Consumer Electronics, Automotive, Communication Equipment, and Others. Consumer Electronics applications include smartphones, tablets, laptops, wearable devices, smart home products, compact terminals, and household electronics. Rapid product iteration and increasing circuit density continue to support demand for Ultra-thin Dry Film and Thin Dry Film. Automotive applications include body control systems, battery management systems, in-vehicle displays, smart cockpits, camera modules, sensors, power control systems, charging systems, and intelligent driving-related circuit boards. Vehicle electrification

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and intelligence increase the requirements for heat resistance, moisture resistance, insulation reliability, and long-term material stability. Communication Equipment applications include base stations, servers, switches, routers, optical communication modules, high-frequency high-speed boards, data center hardware, and network infrastructure, where high-density circuits, low defect rates, batch consistency, and signal reliability are critical.

Market Driving Factors include the continued shift of Consumer Electronics toward thinner, smaller, and more highly integrated designs, which drives PCBs toward finer lines, higher density, and more layers, thereby increasing demand for Ultra-thin Dry Film and Thin Dry Film. The rapid development of electric vehicles and intelligent vehicles is increasing demand for PCBs used in vehicle control, battery management, power electronics, sensors, and intelligent driving systems, while pushing negative dry films toward higher reliability, better heat resistance, better moisture resistance, and lower defect rates. Communication Equipment is evolving toward high-speed transmission, higher frequency, and large-scale data processing, supporting greater use of high-resolution, stable-developing, and highly consistent negative dry films in advanced PCBs, IC substrates, and high-frequency high-speed boards. PCB manufacturers are placing stronger emphasis on yield, automation, process stability, and batch-to-batch consistency, encouraging material suppliers to improve coating uniformity, development latitude, adhesion, and etching resistance. The growth of high-density interconnect boards, flexible circuits, rigid-flex boards, advanced packaging substrates, and precision etching processes is expanding the application space for different thickness categories of negative dry film. Stricter environmental regulation and clean production requirements are also pushing negative dry film materials toward lower residue, lower contamination, easier development, higher material utilization, and better suitability for automated production.

Market Restraints include the high technical requirements for formulation design, clean production, coating uniformity, thickness control, storage stability, and batch consistency, which create meaningful entry barriers. Ultra-thin Dry Film and Thin Dry Film must be matched with high-precision exposure, development, and lamination equipment, resulting in longer customer qualification cycles and more difficult material adoption. Price fluctuations in photosensitive resins, photoinitiators, functional monomers, carrier films, protective films, and functional additives may affect production costs and supply stability. Standardized low-end products face intense competition and price pressure, which may compress manufacturer margins. PCB manufacturers differ in substrate type, copper thickness, circuit design, exposure conditions, development conditions, and etching or plating processes, increasing the complexity of material

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matching and after-sales technical support. Dry film solder mask and other functional negative dry films must also meet long-term insulation, heat resistance, chemical resistance, damp-heat resistance, and reliability testing requirements, extending qualification cycles. In addition, cyclical demand in Consumer Electronics, long Automotive electronics certification timelines, Communication Equipment investment cycles, and rising environmental compliance costs may constrain demand release and profitability.

This report is a detailed and comprehensive analysis for global PCB Negative Dry Film 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 PCB Negative Dry Film market size and forecasts, in consumption value ($ Million), sales quantity (million Sqm), and average selling prices (USD/K Sqm), 2021-2032

Global PCB Negative Dry Film market size and forecasts by region and country, in consumption value ($ Million), sales quantity (million Sqm), and average selling prices (USD/K Sqm), 2021-2032

Global PCB Negative Dry Film market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (million Sqm), and average selling prices (USD/K Sqm), 2021-2032

Global PCB Negative Dry Film market shares of main players, shipments in revenue ($ Million), sales quantity (million Sqm), and ASP (USD/K Sqm), 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 PCB Negative Dry Film

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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 PCB Negative Dry Film 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 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.

Market Segmentation

PCB Negative Dry Film 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

Ultra-thin Dry Film (?15 ?m)

Thin Dry Film (15?50 ?m)

Standard Dry Film (50?100 ?m)

Thick Dry Film (>100 ?m)

Market segment by Development Method

Aqueous-developable

Solvent-developable

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Market segment by Sales Channel

- Direct Sales
- Indirect Sales

Market segment by Application

- Consumer Electronics
- Automotive
- Communication Equipment
- Others

Major players covered

- 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

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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 PCB Negative Dry Film product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PCB Negative Dry Film, with price, sales quantity, revenue, and global market share of PCB Negative Dry Film from 2021 to 2026.

Chapter 3, the PCB Negative Dry Film competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PCB Negative Dry Film 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 PCB Negative Dry Film market forecast, by regions, by Type, and by

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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 PCB Negative Dry Film.

Chapter 14 and 15, to describe PCB Negative Dry Film sales channel, distributors, customers, research findings and conclusion.

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