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

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Abstracts

The global PCB Negative Dry Film market size is expected to reach $ 897 million by 2032, rising at a market growth of 3.8% CAGR during the forecast period (2026-2032).

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

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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 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

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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 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

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

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

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

This report profiles key players in the global PCB 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,

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new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PCB 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.

Global PCB Negative Dry Film Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PCB 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)

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Thick Dry Film (>100 ?m)

Global PCB Negative Dry Film Market, Segmentation by Development Method:

Aqueous-developable

Solvent-developable

Global PCB Negative Dry Film Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global PCB Negative Dry Film Market, Segmentation by Application:

Consumer Electronics

Automotive

Communication Equipment

Others

Companies Profiled:

Asahi Kasei Corporation

Eternal Materials

Resonac Corporation (Showa Denko Materials)

Qnity Electronics (DuPont Riston)

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Chang Chun Group

Kolon Industries

Hunan Initial New Materials

Nagase ChemteX America

Nippon Kayaku

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

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Contents

1 SUPPLY SUMMARY

1.1 PCB Negative Dry Film Introduction
1.2 World PCB Negative Dry Film Supply & Forecast
  1.2.1 World PCB Negative Dry Film Production Value (2021 & 2025 & 2032)
  1.2.2 World PCB Negative Dry Film Production (2021-2032)
  1.2.3 World PCB Negative Dry Film Pricing Trends (2021-2032)
1.3 World PCB Negative Dry Film Production by Region (Based on Production Site)
  1.3.1 World PCB Negative Dry Film Production Value by Region (2021-2032)
  1.3.2 World PCB Negative Dry Film Production by Region (2021-2032)
  1.3.3 World PCB Negative Dry Film Average Price by Region (2021-2032)
  1.3.4 North America PCB Negative Dry Film Production (2021-2032)
  1.3.5 Europe PCB Negative Dry Film Production (2021-2032)
  1.3.6 China PCB Negative Dry Film Production (2021-2032)
  1.3.7 Japan PCB Negative Dry Film Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 PCB Negative Dry Film Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 PCB Negative Dry Film Major Market Trends

2 DEMAND SUMMARY

2.1 World PCB Negative Dry Film Demand (2021-2032)
2.2 World PCB Negative Dry Film Consumption by Region
  2.2.1 World PCB Negative Dry Film Consumption by Region (2021-2026)
  2.2.2 World PCB Negative Dry Film Consumption Forecast by Region (2027-2032)
2.3 United States PCB Negative Dry Film Consumption (2021-2032)
2.4 China PCB Negative Dry Film Consumption (2021-2032)
2.5 Europe PCB Negative Dry Film Consumption (2021-2032)
2.6 Japan PCB Negative Dry Film Consumption (2021-2032)
2.7 South Korea PCB Negative Dry Film Consumption (2021-2032)
2.8 ASEAN PCB Negative Dry Film Consumption (2021-2032)
2.9 India PCB Negative Dry Film Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World PCB Negative Dry Film Production Value by Manufacturer (2021-2026)

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3.2 World PCB Negative Dry Film Production by Manufacturer (2021-2026)
3.3 World PCB Negative Dry Film Average Price by Manufacturer (2021-2026)
3.4 PCB Negative Dry Film Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global PCB Negative Dry Film Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for PCB Negative Dry Film in 2025
  3.5.3 Global Concentration Ratios (CR8) for PCB Negative Dry Film in 2025
3.6 PCB Negative Dry Film Market: Overall Company Footprint Analysis
  3.6.1 PCB Negative Dry Film Market: Region Footprint
  3.6.2 PCB Negative Dry Film Market: Company Product Type Footprint
  3.6.3 PCB Negative Dry Film Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: PCB Negative Dry Film Production Value Comparison
  4.1.1 United States VS China: PCB Negative Dry Film Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: PCB Negative Dry Film Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: PCB Negative Dry Film Production Comparison
  4.2.1 United States VS China: PCB Negative Dry Film Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: PCB Negative Dry Film Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: PCB Negative Dry Film Consumption Comparison
  4.3.1 United States VS China: PCB Negative Dry Film Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: PCB Negative Dry Film Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based PCB Negative Dry Film Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers PCB Negative Dry Film Production Value (2021-2026)
4.4.3 United States Based Manufacturers PCB Negative Dry Film Production (2021-2026)
4.5 China Based PCB Negative Dry Film Manufacturers and Market Share
4.5.1 China Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers PCB Negative Dry Film Production Value (2021-2026)
4.5.3 China Based Manufacturers PCB Negative Dry Film Production (2021-2026)
4.6 Rest of World Based PCB Negative Dry Film Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers PCB Negative Dry Film Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers PCB Negative Dry Film Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World PCB Negative Dry Film Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Ultra-thin Dry Film (?15 ?m)
5.2.2 Thin Dry Film (15?50 ?m)
5.2.3 Standard Dry Film (50?100 ?m)
5.2.4 Thick Dry Film (>100 ?m)
5.3 Market Segment by Type
5.3.1 World PCB Negative Dry Film Production by Type (2021-2032)
5.3.2 World PCB Negative Dry Film Production Value by Type (2021-2032)
5.3.3 World PCB Negative Dry Film Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DEVELOPMENT METHOD

6.1 World PCB Negative Dry Film Market Size Overview by Development Method: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Development Method
6.2.1 Aqueous-developable

+357 96 030922
info@marketpublishers.com

6.2.2 Solvent-developable
6.3 Market Segment by Development Method
6.3.1 World PCB Negative Dry Film Production by Development Method (2021-2032)
6.3.2 World PCB Negative Dry Film Production Value by Development Method (2021-2032)
6.3.3 World PCB Negative Dry Film Average Price by Development Method (2021-2032)

7 MARKET ANALYSIS BY SALES CHANNEL

7.1 World PCB Negative Dry Film Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Sales Channel
7.2.1 Direct Sales
7.2.2 Indirect Sales
7.3 Market Segment by Sales Channel
7.3.1 World PCB Negative Dry Film Production by Sales Channel (2021-2032)
7.3.2 World PCB Negative Dry Film Production Value by Sales Channel (2021-2032)
7.3.3 World PCB Negative Dry Film Average Price by Sales Channel (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World PCB Negative Dry Film Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Consumer Electronics
8.2.2 Automotive
8.2.3 Communication Equipment
8.2.4 Others
8.3 Market Segment by Application
8.3.1 World PCB Negative Dry Film Production by Application (2021-2032)
8.3.2 World PCB Negative Dry Film Production Value by Application (2021-2032)
8.3.3 World PCB Negative Dry Film Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Asahi Kasei Corporation
9.1.1 Asahi Kasei Corporation Details
9.1.2 Asahi Kasei Corporation Major Business

+357 96 030922
info@marketpublishers.com

9.1.3 Asahi Kasei Corporation PCB Negative Dry Film Product and Services
9.1.4 Asahi Kasei Corporation PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Asahi Kasei Corporation Recent Developments/Updates
9.1.6 Asahi Kasei Corporation Competitive Strengths & Weaknesses
9.2 Eternal Materials
9.2.1 Eternal Materials Details
9.2.2 Eternal Materials Major Business
9.2.3 Eternal Materials PCB Negative Dry Film Product and Services
9.2.4 Eternal Materials PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Eternal Materials Recent Developments/Updates
9.2.6 Eternal Materials Competitive Strengths & Weaknesses
9.3 Resonac Corporation (Showa Denko Materials)
9.3.1 Resonac Corporation (Showa Denko Materials) Details
9.3.2 Resonac Corporation (Showa Denko Materials) Major Business
9.3.3 Resonac Corporation (Showa Denko Materials) PCB Negative Dry Film Product and Services
9.3.4 Resonac Corporation (Showa Denko Materials) PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Resonac Corporation (Showa Denko Materials) Recent Developments/Updates
9.3.6 Resonac Corporation (Showa Denko Materials) Competitive Strengths & Weaknesses
9.4 Qnity Electronics (DuPont Riston)
9.4.1 Qnity Electronics (DuPont Riston) Details
9.4.2 Qnity Electronics (DuPont Riston) Major Business
9.4.3 Qnity Electronics (DuPont Riston) PCB Negative Dry Film Product and Services
9.4.4 Qnity Electronics (DuPont Riston) PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Qnity Electronics (DuPont Riston) Recent Developments/Updates
9.4.6 Qnity Electronics (DuPont Riston) Competitive Strengths & Weaknesses
9.5 Chang Chun Group
9.5.1 Chang Chun Group Details
9.5.2 Chang Chun Group Major Business
9.5.3 Chang Chun Group PCB Negative Dry Film Product and Services
9.5.4 Chang Chun Group PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Chang Chun Group Recent Developments/Updates
9.5.6 Chang Chun Group Competitive Strengths & Weaknesses

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9.6 Kolon Industries
9.6.1 Kolon Industries Details
9.6.2 Kolon Industries Major Business
9.6.3 Kolon Industries PCB Negative Dry Film Product and Services
9.6.4 Kolon Industries PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Kolon Industries Recent Developments/Updates
9.6.6 Kolon Industries Competitive Strengths & Weaknesses
9.7 Hunan Initial New Materials
9.7.1 Hunan Initial New Materials Details
9.7.2 Hunan Initial New Materials Major Business
9.7.3 Hunan Initial New Materials PCB Negative Dry Film Product and Services
9.7.4 Hunan Initial New Materials PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Hunan Initial New Materials Recent Developments/Updates
9.7.6 Hunan Initial New Materials Competitive Strengths & Weaknesses
9.8 Nagase ChemteX America
9.8.1 Nagase ChemteX America Details
9.8.2 Nagase ChemteX America Major Business
9.8.3 Nagase ChemteX America PCB Negative Dry Film Product and Services
9.8.4 Nagase ChemteX America PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Nagase ChemteX America Recent Developments/Updates
9.8.6 Nagase ChemteX America Competitive Strengths & Weaknesses
9.9 Nippon Kayaku
9.9.1 Nippon Kayaku Details
9.9.2 Nippon Kayaku Major Business
9.9.3 Nippon Kayaku PCB Negative Dry Film Product and Services
9.9.4 Nippon Kayaku PCB Negative Dry Film Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Nippon Kayaku Recent Developments/Updates
9.9.6 Nippon Kayaku Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 PCB Negative Dry Film Industry Chain
10.2 PCB Negative Dry Film Upstream Analysis
10.2.1 PCB Negative Dry Film Core Raw Materials
10.2.2 Main Manufacturers of PCB Negative Dry Film Core Raw Materials

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10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 PCB Negative Dry Film Production Mode
10.6 PCB Negative Dry Film Procurement Model
10.7 PCB Negative Dry Film Industry Sales Model and Sales Channels
10.7.1 PCB Negative Dry Film Sales Model
10.7.2 PCB Negative Dry Film Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World PCB Negative Dry Film Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World PCB Negative Dry Film Production Value by Region (2021-2026) & (USD Million)
Table 3. World PCB Negative Dry Film Production Value by Region (2027-2032) & (USD Million)
Table 4. World PCB Negative Dry Film Production Value Market Share by Region (2021-2026)
Table 5. World PCB Negative Dry Film Production Value Market Share by Region (2027-2032)
Table 6. World PCB Negative Dry Film Production by Region (2021-2026) & (million Sqm)
Table 7. World PCB Negative Dry Film Production by Region (2027-2032) & (million Sqm)
Table 8. World PCB Negative Dry Film Production Market Share by Region (2021-2026)
Table 9. World PCB Negative Dry Film Production Market Share by Region (2027-2032)
Table 10. World PCB Negative Dry Film Average Price by Region (2021-2026) & (USD/K Sqm)
Table 11. World PCB Negative Dry Film Average Price by Region (2027-2032) & (USD/K Sqm)
Table 12. PCB Negative Dry Film Major Market Trends
Table 13. World PCB Negative Dry Film Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (million Sqm)
Table 14. World PCB Negative Dry Film Consumption by Region (2021-2026) & (million Sqm)
Table 15. World PCB Negative Dry Film Consumption Forecast by Region (2027-2032) & (million Sqm)
Table 16. World PCB Negative Dry Film Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key PCB Negative Dry Film Producers in 2025
Table 18. World PCB Negative Dry Film Production by Manufacturer (2021-2026) & (million Sqm)
Table 19. Production Market Share of Key PCB Negative Dry Film Producers in 2025
Table 20. World PCB Negative Dry Film Average Price by Manufacturer (2021-2026) &

+357 96 030922
info@marketpublishers.com

(USD/K Sqm)
Table 21. Global PCB Negative Dry Film Company Evaluation Quadrant
Table 22. World PCB Negative Dry Film Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and PCB Negative Dry Film Production Site of Key Manufacturer
Table 24. PCB Negative Dry Film Market: Company Product Type Footprint
Table 25. PCB Negative Dry Film Market: Company Product Application Footprint
Table 26. PCB Negative Dry Film Competitive Factors
Table 27. PCB Negative Dry Film New Entrant and Capacity Expansion Plans
Table 28. PCB Negative Dry Film Mergers & Acquisitions Activity
Table 29. United States VS China PCB Negative Dry Film Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China PCB Negative Dry Film Production Comparison, (2021 & 2025 & 2032) & (million Sqm)
Table 31. United States VS China PCB Negative Dry Film Consumption Comparison, (2021 & 2025 & 2032) & (million Sqm)
Table 32. United States Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers PCB Negative Dry Film Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers PCB Negative Dry Film Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers PCB Negative Dry Film Production (2021-2026) & (million Sqm)
Table 36. United States Based Manufacturers PCB Negative Dry Film Production Market Share (2021-2026)
Table 37. China Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers PCB Negative Dry Film Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers PCB Negative Dry Film Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers PCB Negative Dry Film Production, (2021-2026) & (million Sqm)
Table 41. China Based Manufacturers PCB Negative Dry Film Production Market Share (2021-2026)
Table 42. Rest of World Based PCB Negative Dry Film Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers PCB Negative Dry Film Production

+357 96 030922
info@marketpublishers.com

Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers PCB Negative Dry Film Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers PCB Negative Dry Film Production, (2021-2026) & (million Sqm)
Table 46. Rest of World Based Manufacturers PCB Negative Dry Film Production Market Share (2021-2026)
Table 47. World PCB Negative Dry Film Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World PCB Negative Dry Film Production by Type (2021-2026) & (million Sqm)
Table 49. World PCB Negative Dry Film Production by Type (2027-2032) & (million Sqm)
Table 50. World PCB Negative Dry Film Production Value by Type (2021-2026) & (USD Million)
Table 51. World PCB Negative Dry Film Production Value by Type (2027-2032) & (USD Million)
Table 52. World PCB Negative Dry Film Average Price by Type (2021-2026) & (USD/K Sqm)
Table 53. World PCB Negative Dry Film Average Price by Type (2027-2032) & (USD/K Sqm)
Table 54. World PCB Negative Dry Film Production Value by Development Method, (USD Million), 2021 & 2025 & 2032
Table 55. World PCB Negative Dry Film Production by Development Method (2021-2026) & (million Sqm)
Table 56. World PCB Negative Dry Film Production by Development Method (2027-2032) & (million Sqm)
Table 57. World PCB Negative Dry Film Production Value by Development Method (2021-2026) & (USD Million)
Table 58. World PCB Negative Dry Film Production Value by Development Method (2027-2032) & (USD Million)
Table 59. World PCB Negative Dry Film Average Price by Development Method (2021-2026) & (USD/K Sqm)
Table 60. World PCB Negative Dry Film Average Price by Development Method (2027-2032) & (USD/K Sqm)
Table 61. World PCB Negative Dry Film Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032
Table 62. World PCB Negative Dry Film Production by Sales Channel (2021-2026) & (million Sqm)

+357 96 030922
info@marketpublishers.com

Table 63. World PCB Negative Dry Film Production by Sales Channel (2027-2032) & (million Sqm)
Table 64. World PCB Negative Dry Film Production Value by Sales Channel (2021-2026) & (USD Million)
Table 65. World PCB Negative Dry Film Production Value by Sales Channel (2027-2032) & (USD Million)
Table 66. World PCB Negative Dry Film Average Price by Sales Channel (2021-2026) & (USD/K Sqm)
Table 67. World PCB Negative Dry Film Average Price by Sales Channel (2027-2032) & (USD/K Sqm)
Table 68. World PCB Negative Dry Film Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World PCB Negative Dry Film Production by Application (2021-2026) & (million Sqm)
Table 70. World PCB Negative Dry Film Production by Application (2027-2032) & (million Sqm)
Table 71. World PCB Negative Dry Film Production Value by Application (2021-2026) & (USD Million)
Table 72. World PCB Negative Dry Film Production Value by Application (2027-2032) & (USD Million)
Table 73. World PCB Negative Dry Film Average Price by Application (2021-2026) & (USD/K Sqm)
Table 74. World PCB Negative Dry Film Average Price by Application (2027-2032) & (USD/K Sqm)
Table 75. Asahi Kasei Corporation Basic Information, Manufacturing Base and Competitors
Table 76. Asahi Kasei Corporation Major Business
Table 77. Asahi Kasei Corporation PCB Negative Dry Film Product and Services
Table 78. Asahi Kasei Corporation PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Asahi Kasei Corporation Recent Developments/Updates
Table 80. Asahi Kasei Corporation Competitive Strengths & Weaknesses
Table 81. Eternal Materials Basic Information, Manufacturing Base and Competitors
Table 82. Eternal Materials Major Business
Table 83. Eternal Materials PCB Negative Dry Film Product and Services
Table 84. Eternal Materials PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 85. Eternal Materials Recent Developments/Updates
Table 86. Eternal Materials Competitive Strengths & Weaknesses
Table 87. Resonac Corporation (Showa Denko Materials) Basic Information, Manufacturing Base and Competitors
Table 88. Resonac Corporation (Showa Denko Materials) Major Business
Table 89. Resonac Corporation (Showa Denko Materials) PCB Negative Dry Film Product and Services
Table 90. Resonac Corporation (Showa Denko Materials) PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Resonac Corporation (Showa Denko Materials) Recent Developments/Updates
Table 92. Resonac Corporation (Showa Denko Materials) Competitive Strengths & Weaknesses
Table 93. Qnity Electronics (DuPont Riston) Basic Information, Manufacturing Base and Competitors
Table 94. Qnity Electronics (DuPont Riston) Major Business
Table 95. Qnity Electronics (DuPont Riston) PCB Negative Dry Film Product and Services
Table 96. Qnity Electronics (DuPont Riston) PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Qnity Electronics (DuPont Riston) Recent Developments/Updates
Table 98. Qnity Electronics (DuPont Riston) Competitive Strengths & Weaknesses
Table 99. Chang Chun Group Basic Information, Manufacturing Base and Competitors
Table 100. Chang Chun Group Major Business
Table 101. Chang Chun Group PCB Negative Dry Film Product and Services
Table 102. Chang Chun Group PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Chang Chun Group Recent Developments/Updates
Table 104. Chang Chun Group Competitive Strengths & Weaknesses
Table 105. Kolon Industries Basic Information, Manufacturing Base and Competitors
Table 106. Kolon Industries Major Business
Table 107. Kolon Industries PCB Negative Dry Film Product and Services
Table 108. Kolon Industries PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Kolon Industries Recent Developments/Updates

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Table 110. Kolon Industries Competitive Strengths & Weaknesses
Table 111. Hunan Initial New Materials Basic Information, Manufacturing Base and Competitors
Table 112. Hunan Initial New Materials Major Business
Table 113. Hunan Initial New Materials PCB Negative Dry Film Product and Services
Table 114. Hunan Initial New Materials PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Hunan Initial New Materials Recent Developments/Updates
Table 116. Hunan Initial New Materials Competitive Strengths & Weaknesses
Table 117. Nagase ChemteX America Basic Information, Manufacturing Base and Competitors
Table 118. Nagase ChemteX America Major Business
Table 119. Nagase ChemteX America PCB Negative Dry Film Product and Services
Table 120. Nagase ChemteX America PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Nagase ChemteX America Recent Developments/Updates
Table 122. Nagase ChemteX America Competitive Strengths & Weaknesses
Table 123. Nippon Kayaku Basic Information, Manufacturing Base and Competitors
Table 124. Nippon Kayaku Major Business
Table 125. Nippon Kayaku PCB Negative Dry Film Product and Services
Table 126. Nippon Kayaku PCB Negative Dry Film Production (million Sqm), Price (USD/K Sqm), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Nippon Kayaku Recent Developments/Updates
Table 128. Nippon Kayaku Competitive Strengths & Weaknesses
Table 129. Global Key Players of PCB Negative Dry Film Upstream (Raw Materials)
Table 130. Global PCB Negative Dry Film Typical Customers
Table 131. PCB Negative Dry Film Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. PCB Negative Dry Film Picture
Figure 2. World PCB Negative Dry Film Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World PCB Negative Dry Film Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World PCB Negative Dry Film Production (2021-2032) & (million Sqm)
Figure 5. World PCB Negative Dry Film Average Price (2021-2032) & (USD/K Sqm)
Figure 6. World PCB Negative Dry Film Production Value Market Share by Region (2021-2032)
Figure 7. World PCB Negative Dry Film Production Market Share by Region (2021-2032)
Figure 8. North America PCB Negative Dry Film Production (2021-2032) & (million Sqm)
Figure 9. Europe PCB Negative Dry Film Production (2021-2032) & (million Sqm)
Figure 10. China PCB Negative Dry Film Production (2021-2032) & (million Sqm)
Figure 11. Japan PCB Negative Dry Film Production (2021-2032) & (million Sqm)
Figure 12. PCB Negative Dry Film Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 15. World PCB Negative Dry Film Consumption Market Share by Region (2021-2032)
Figure 16. United States PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 17. China PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 18. Europe PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 19. Japan PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 20. South Korea PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 21. ASEAN PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 22. India PCB Negative Dry Film Consumption (2021-2032) & (million Sqm)
Figure 23. Producer Shipments of PCB Negative Dry Film by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for PCB Negative Dry Film Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for PCB Negative Dry Film

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Markets in 2025
Figure 26. United States VS China: PCB Negative Dry Film Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: PCB Negative Dry Film Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: PCB Negative Dry Film Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers PCB Negative Dry Film Production Market Share 2025
Figure 30. China Based Manufacturers PCB Negative Dry Film Production Market Share 2025
Figure 31. Rest of World Based Manufacturers PCB Negative Dry Film Production Market Share 2025
Figure 32. World PCB Negative Dry Film Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World PCB Negative Dry Film Production Value Market Share by Type in 2025
Figure 34. Ultra-thin Dry Film (?15 ?m)
Figure 35. Thin Dry Film (15?50 ?m)
Figure 36. Standard Dry Film (50?100 ?m)
Figure 37. Thick Dry Film (>100 ?m)
Figure 38. World PCB Negative Dry Film Production Market Share by Type (2021-2032)
Figure 39. World PCB Negative Dry Film Production Value Market Share by Type (2021-2032)
Figure 40. World PCB Negative Dry Film Average Price by Type (2021-2032) & (USD/K Sqm)
Figure 41. World PCB Negative Dry Film Production Value by Development Method, (USD Million), 2021 & 2025 & 2032
Figure 42. World PCB Negative Dry Film Production Value Market Share by Development Method in 2025
Figure 43. Aqueous-developable
Figure 44. Solvent-developable
Figure 45. World PCB Negative Dry Film Production Market Share by Development Method (2021-2032)
Figure 46. World PCB Negative Dry Film Production Value Market Share by Development Method (2021-2032)
Figure 47. World PCB Negative Dry Film Average Price by Development Method (2021-2032) & (USD/K Sqm)
Figure 48. World PCB Negative Dry Film Production Value by Sales Channel, (USD

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Million), 2021 & 2025 & 2032
Figure 49. World PCB Negative Dry Film Production Value Market Share by Sales Channel in 2025
Figure 50. Direct Sales
Figure 51. Indirect Sales
Figure 52. World PCB Negative Dry Film Production Market Share by Sales Channel (2021-2032)
Figure 53. World PCB Negative Dry Film Production Value Market Share by Sales Channel (2021-2032)
Figure 54. World PCB Negative Dry Film Average Price by Sales Channel (2021-2032) & (USD/K Sqm)
Figure 55. World PCB Negative Dry Film Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 56. World PCB Negative Dry Film Production Value Market Share by Application in 2025
Figure 57. Consumer Electronics
Figure 58. Automotive
Figure 59. Communication Equipment
Figure 60. Others
Figure 61. World PCB Negative Dry Film Production Market Share by Application (2021-2032)
Figure 62. World PCB Negative Dry Film Production Value Market Share by Application (2021-2032)
Figure 63. World PCB Negative Dry Film Average Price by Application (2021-2032) & (USD/K Sqm)
Figure 64. PCB Negative Dry Film Industry Chain
Figure 65. PCB Negative Dry Film Procurement Model
Figure 66. PCB Negative Dry Film Sales Model
Figure 67. PCB Negative Dry Film Sales Channels, Direct Sales, and Distribution
Figure 68. Methodology
Figure 69. Research Process and Data Source

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