

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

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Abstracts

The global PCB Negative Photosensitive 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 Photosensitive 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 Photosensitive 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 Photosensitive 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.

The downstream applications of PCB Negative Photosensitive 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 Photosensitive 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 Photosensitive Dry Film can be classified into Ultra-thin Dry Film ($\leq 15\ \mu\text{m}$), Thin Dry Film (15–50 μm), Standard Dry Film (50–100 μm), and Thick Dry Film ($>100\ \mu\text{m}$). Ultra-thin Dry Film with a thickness of $\leq 15\ \mu\text{m}$ 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 μm 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 μm 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 $>100\ \mu\text{m}$ 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 Photosensitive 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 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 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.

Report Scope

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

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

Highlights and key features of the study

Global PCB Negative Photosensitive Dry Film total production and demand, 2021-2032, (million Sqm)

Global PCB Negative Photosensitive Dry Film total production value, 2021-2032, (USD Million)

Global PCB Negative Photosensitive Dry Film production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm), (based on production site)

Global PCB Negative Photosensitive Dry Film consumption by region & country, CAGR, 2021-2032 & (million Sqm)

U.S. VS China: PCB Negative Photosensitive Dry Film domestic production, consumption, key domestic manufacturers and share

Global PCB Negative Photosensitive Dry Film production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (million Sqm)

Global PCB Negative Photosensitive Dry Film production by Type, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)

Global PCB Negative Photosensitive Dry Film production by Application, production, value, CAGR, 2021-2032, (USD Million) & (million Sqm)

This report profiles key players in the global PCB Negative Photosensitive 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, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PCB Negative Photosensitive 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 Photosensitive Dry Film Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global PCB Negative Photosensitive Dry Film Market, Segmentation by Type:

Ultra-thin Photosensitive Dry Film ($\leq 15 \mu\text{m}$)

Thin Photosensitive Dry Film (15–50 μm)

Standard Photosensitive Dry Film (50–100 μm)

Thick Photosensitive Dry Film ($>100 \mu\text{m}$)

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

Aqueous-developable

Solvent-developable

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

Direct Sales

Indirect Sales

Global PCB Negative Photosensitive 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)

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 Photosensitive Dry Film market?
2. What is the demand of the global PCB Negative Photosensitive Dry Film market?
3. What is the year over year growth of the global PCB Negative Photosensitive Dry Film market?
4. What is the total value of the global PCB Negative Photosensitive Dry Film market?
5. Who are the Major Players in the global PCB Negative Photosensitive Dry Film market?
6. What are the growth factors driving the market demand?

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