

Global Photoresist and Photoresist Ancillaries Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Photoresist and Photoresist Ancillaries market size is expected to reach \$ 8044 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Semiconductor photoresists and photoresist ancillary materials are core electronic chemicals used in lithography and pattern-transfer processes for integrated circuits, advanced packaging, MEMS, CMOS image sensors, compound semiconductors and other micro- and nano-fabrication applications. Photoresists form transferable patterns on wafers or packaging substrates through coating, exposure, post-exposure bake and development, serving as etch masks, electroplating molds, lift-off layers and microstructure-forming materials. Photoresist ancillary materials support development, resist stripping, dilution, edge bead removal, reflectivity control, multilayer pattern transfer, adhesion enhancement, rinsing, surface protection and defect control. The product scope covers g-line, i-line, KrF, ArF dry, ArF immersion, EUV, e-beam and thick-film positive or negative photoresists, as well as developers, strippers, removers, thinners, edge bead removers, anti-reflective coatings, BARCs, TARCs, topcoats, underlayers, spin-on carbon, spin-on glass, rinses, HMDS and other lithography process-supporting materials.

The market for semiconductor photoresists and photoresist ancillary materials should be structured first around two primary segments: Photoresist and Photoresist Ancillaries. Photoresists are the pattern-forming materials that define resolution, critical-dimension control, pattern fidelity, etch resistance and electroplating mold performance. Photoresist ancillaries support the lithography process chain through development, stripping, dilution, edge bead removal, reflectivity control, underlayer pattern transfer, rinsing, surface protection and defect reduction. The two segments are tightly linked in

fab and packaging process recipes, particularly in ArF immersion, EUV, multipatterning, advanced packaging thick-film resist and MEMS thick-structure applications.

The global competitive structure is concentrated around Japanese, US, Korean and European suppliers. Japanese companies hold the strongest position in advanced IC photoresists, with TOK, JSR, Shin-Etsu, FUJIFILM and Sumitomo Chemical covering multiple product generations from mature g-line and i-line materials to KrF, ArF, EUV and advanced-packaging thick-film resists. US-linked suppliers such as DuPont, Inpria, Brewer Science and Kayaku Advanced Materials are important across photoresists, EUV metal oxide resist, anti-reflective coatings, underlayers and MEMS specialty materials. Korea's Dongjin Semichem has built a meaningful position across photoresist, thinner, BARC and SOC materials, while Merck/EMD, micro resist technology and Allresist represent Europe's presence in AZ legacy materials, specialty resists and micro- and nanofabrication chemistries.

Demand growth is driven by advanced logic, DRAM/HBM, 3D NAND, advanced packaging, CMOS image sensors and compound semiconductors. EUV and future High-NA EUV lithography increase requirements for stochastic defect control, line-edge roughness reduction, sensitivity, etch resistance and new resist chemistries such as metal oxide resist. ArF immersion remains essential for advanced logic and memory multipatterning, while KrF, i-line and thick-film resists continue to serve mature nodes, power devices, MEMS and packaging. In advanced packaging, RDL, bumping, WLCSP, fan-out and TSV processes support demand for thick positive and negative resists, developers, strippers and edge bead removers.

Industry dynamics increasingly reflect supply-chain security, regional capacity allocation and localization. DuPont has expanded semiconductor photoresist capacity at its Sasakami site in Japan, Sumitomo Chemical is expanding evaluation and development facilities for ArF and i-line thick-film photoresists, TOK has strengthened its specialty lithography materials footprint through micro resist technology, and JSR/Inpria continues to develop EUV metal oxide resist technology. Chinese suppliers are advancing in KrF, i-line, ArF validation, advanced packaging resists and lithography ancillaries, but stable mass production for advanced ArF immersion and EUV-grade materials remains constrained by purification, defectivity, formulation control and customer qualification.

This report studies the global Photoresist and Photoresist Ancillaries demand, key companies, and key regions.

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

Highlights and key features of the study

Global Photoresist and Photoresist Ancillaries total market, 2021-2032, (USD Million)

Global Photoresist and Photoresist Ancillaries total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Photoresist and Photoresist Ancillaries total market, key domestic companies, and share, (USD Million)

Global Photoresist and Photoresist Ancillaries revenue by player, revenue and market share 2021-2026, (USD Million)

Global Photoresist and Photoresist Ancillaries total market by Type, CAGR, 2021-2032, (USD Million)

Global Photoresist and Photoresist Ancillaries total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Photoresist and Photoresist Ancillaries market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include TOKYO OHKA KOGYO CO., LTD. (TOK), JSR, Shin-Etsu Chemical, Qnity, Fujifilm, Sumitomo Chemical, Dongjin Semichem, Merck KGaA (AZ), Allresist GmbH, Futurrex, 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 Photoresist and Photoresist Ancillaries market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Photoresist and Photoresist Ancillaries Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photoresist and Photoresist Ancillaries Market, Segmentation by Type:

Photoresist

Photoresist Ancillaries

Global Photoresist and Photoresist Ancillaries Market, Segmentation By Photoresist Ancillary Function:

g-line Photoresist

i-line Photoresist

KrF Photoresist

ArF Dry Photoresist

ArF Immersion Photoresist

EUV Photoresist

E-beam Photoresist

Advanced Packaging Thick-film Photoresist

MEMS / Specialty Photoresist

Global Photoresist and Photoresist Ancillaries Market, Segmentation by Application:

IC Front-end

Advanced Packaging

MEMS and Sensors

CMOS Image Sensors

Compound Semiconductors

Photomask and E-beam Lithography

Other Microfabrication

Companies Profiled:

TOKYO OHKA KOGYO CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

Qnity

Fujifilm

Sumitomo Chemical

Dongjin Semichem

Merck KGaA (AZ)

Allresist GmbH

Futurrex

KemLab? Inc

YCCHEM Co., Ltd

SK Materials Performance (SKMP)

Everlight Chemical

Red Avenue

Crystal Clear Electronic Material

Xuzhou B & C Chemical

Xiamen Hengkun New Material Technology

Jiangsu Aisen Semiconductor Material

Zhuhai Cornerstone Technologies

Shanghai Sinyang Semiconductor Materials

ShenZhen RongDa Photosensitive Science & Technology

SINEVA

Guoke Tianji

Jiangsu Nata Opto-electronic Material

PhiChem

Samsung SDI

Hubei Dinglong Holding

Lam Research

Tianjin Jiuri New Material

Brewer Science

Nissan Chemical

Honeywell

Toray

HD Microsystems

Asahi Kasei

Sumitomo Bakelite

Bomi Technology Co., Ltd

Desert Silicon, Inc.

Zeon

Xinyaqiang Silicon Chemistry

Anji Microelectronics Technology

Key Questions Answered

1. How big is the global Photoresist and Photoresist Ancillaries market?
2. What is the demand of the global Photoresist and Photoresist Ancillaries market?

3. What is the year over year growth of the global Photoresist and Photoresist Ancillaries market?
4. What is the total value of the global Photoresist and Photoresist Ancillaries market?
5. Who are the Major Players in the global Photoresist and Photoresist Ancillaries market?
6. What are the growth factors driving the market demand?

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