

Global Photoresist (PR) 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 Photoresist (PR) market size was valued at US\$ 3436 million in 2025 and is forecast to a readjusted size of US\$ 5255 million by 2032 with a CAGR of 6.4% during review period.

Photoresist (PR) is a chemical that changes properties when exposed to certain wavelengths of light to form desired patterns of coating on substrate surfaces. PR serves as key material for the photolithography of semiconductor circuits in the manufacturing process.

In the semiconductor photoresist, the key manufacturers are currently concentrated in Japan, the United States, and South Korea. Key players include Tokyo Ohka Kogyo (TOK), JSR, Shin-Etsu Chemical, Qnity, FUJIFILM, Sumitomo Chemical, and South Korea's Dongjin Semichem. In 2024, the top six semiconductor photoresist producers accounted for approximately 84.6% of global market share (per industry estimates). Leading domestic suppliers in China currently include Red Avenue, Crystal Clear Electronic Material, Xuzhou B & C Chemical, Xiamen Hengkun New Material Technology, Zhuhai Cornerstone Technologies, Shanghai Sinyang Semiconductor Materials, ShenZhen RongDa Photosensitive Science & Technology, SINEVA, Guoke Tianji, Jiangsu Nata Opto-electronic Material, and PhiChem.

Structurally, the mix in 2025 is still DUV-dominated: ArFi (~26.1%) + KrF (~25.5%) + g/i-Line (~24.6%) ? 76% of total value, reflecting the reality that even in leading-edge flows, EUV is used for the most intricate layers while many remaining layers continue to be patterned with DUV, and both platforms run in parallel for years. Within DUV, ArFi's weight is also consistent with technology boundaries: for many ?mainstream-to-

advanced mature? nodes, immersion ArF remains a foundational lithography capability. Meanwhile, EUV photoresists are the clear growth engine (rising from ~\$80M to ~\$374M from 2020 to 2025; fastest growth rate among your segments), but still only ~11.2% of the 2025 total?i.e., EUV is driving the growth, while DUV still carries the volume and breadth of layers.

Looking forward over the next few years, the direction is: EUV grows fastest; ArFi stays resilient; KrF and g/i-Line remain stable-to-slight growth; ArF Dry grows modestly; E-beam grows steadily but niche?each for different ?real-fab? reasons. EUV resists should keep outgrowing the market because EUV layer counts and EUV exposure intensity rise with continued scaling, and the ecosystem is now also entering the High-NA EUV era (tool milestones such as acceptance testing and High-NA platform ramp are now public), which tightens resist requirements and pulls more innovation spend into EUV materials (stochastics/roughness/sensitivity tradeoffs, outgassing control, etc.). ArFi resists are likely to remain the ?workhorse premium DUV? category: even where EUV expands, ArFi continues to print many non-EUV layers and supports huge installed bases at 28/22/16/14nm-class and below, and a lot of capacity being added globally is still in ranges that rely on ArFi capability. ArF Dry typically tracks a broad swath of mature logic and specialty IC production, so expect low-to-mid single-digit growth driven more by wafer-start expansion and mix (specialty, analog, PMIC, CIS, etc.) than by ?node shrinks.? KrF should stay solid because it sits in the cost/performance sweet spot for many mature nodes and selected tighter-pattern layers where ArF isn?t required; its main driver is mature-node capacity + automotive/industrial stability, with cyclicity tied to overall wafer starts. g/i-Line is ?sticky? for thick resist and back-end / packaging-centric lithography, so advanced packaging scaling (more RDL layers, bumping/plating processes, wafer-/panel-level packaging) tends to underpin demand even when leading-edge front-end is soft; suppliers explicitly position g/i-line portfolios around thick-film variants and packaging-related patterning use-cases (including RDL). E-beam resists should grow steadily (but remain small) because advanced mask making?especially EUV masks?depends heavily on e-beam lithography resist performance, and mask complexity rises as design rules tighten. Macro-wise, a supportive tailwind for all categories is the expectation that wafer-fab investment and capacity expansion are lifted by AI-driven logic and memory demand into 2026?2027, which typically flows through into lithography materials consumption with a lag.

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

Global Photoresist (PR) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K gallon), and average selling prices (US\$/gallon), 2021-2032

Global Photoresist (PR) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K gallon), and average selling prices (US\$/gallon), 2021-2032

Global Photoresist (PR) market shares of main players, shipments in revenue (\$ Million), sales quantity (K gallon), and ASP (US\$/gallon), 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 Photoresist (PR)

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 Photoresist (PR) 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 TOKYO OHKA KOGYO CO., LTD. (TOK), JSR, Shin-Etsu Chemical, DuPont, 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.

Market Segmentation

Photoresist (PR) 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

EUV Photoresist

ArFi Photoresist

ArF Dry Photoresist

KrF Photoresist

g/i-Line

Others

Market segment by Imaging Mechanism

Positive Photoresists

Negative Photoresists

Market segment by Process Node

High End / Advanced 110nm

DRAM and NAND

Market segment by Application

IC Manufacturing

Advanced Packaging

Major players covered

TOKYO OHKA KOGYO CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

DuPont

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

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 Photoresist (PR) product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Photoresist (PR) 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 Photoresist (PR) 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 Photoresist (PR).

Chapter 14 and 15, to describe Photoresist (PR) sales channel, distributors, customers, research findings and conclusion.

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