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Global Photoresists for Advanced IC Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Photoresists for Advanced IC Packaging market size is expected to reach $ 552 million by 2032, rising at a market growth of 9.4% CAGR during the forecast period (2026-2032).

Photoresists for advanced IC packaging are liquid photosensitive polymer materials used in back-end advanced packaging processes to perform lithographic patterning, plating-mask formation and metal-interconnect definition. They are mainly used in RDL, bumping, Cu pillar, micro-bump, TSV, UBM, WL-CSP, flip-chip, fan-out WLP, 2.5D/3D integration, HBM and chiplet-related packaging structures. The core product categories are liquid positive-tone thick-film photoresists and liquid negative-tone thick-film photoresists, which are applied through spin coating, soft bake, exposure, development, electroplating, etching and stripping steps to form temporary patterns on wafers or reconstructed wafers. Key performance requirements include film-thickness uniformity, exposure and development latitude, pattern resolution, sidewall verticality, plating-bath resistance, adhesion to metal or dielectric surfaces, low residue after stripping and high-volume manufacturing stability. Negative-tone products are typically more suitable for thick plating masks, bumping and high-aspect-ratio structures, with representative suppliers including JSR, Merck KGaA and Aisen Semiconductor Material and representative products including THB-151N, THB-111N and THB-126N. Positive-tone products generally emphasize resolution, pattern profile, stripping performance and plating compatibility, with representative suppliers including TOK and Merck KGaA and representative products including TWC300, TKM7000 and AZ 4620. JSR positions its THB series for metal plating and bumping processes, while TOK describes its bump formation resist as suitable for Cu pillar BGA, TSV memory microbumps and continuous Cu/Ni/SnAg plating, confirming their role in advanced packaging interconnect fabrication.

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The market for photoresists for advanced IC packaging is extending from traditional bumping, WL-CSP and flip-chip applications toward higher-density RDL, Cu pillar, micro-bump, TSV, fan-out WLP, 2.5D/3D integration and HBM/chiplet packaging platforms. As advanced packaging evolves from a chip-protection step into a system-level interconnect platform, packaging photoresists are becoming process-critical materials that affect plating quality, interconnect dimensional control, package yield and long-term reliability. Negative-tone thick-film photoresists are well suited to thick plating masks and high-aspect-ratio structures, with JSR's THB series representing a key product platform. JSR publicly positions THB photoresists for metal plating and bumping processes and highlights plating tolerance, stripping performance, exposure throughput and process margins. Positive-tone thick-film photoresists emphasize pattern profile, resolution and removability in RDL, Cu pillar, micro-bump and WL-CSP applications. TOK's positive-tone bump formation resist is designed for high-aspect-ratio electroplated electrode formation and supports continuous Cu, Ni and SnAg plating.

The global competitive landscape remains led by Japanese, U.S. and European materials suppliers, with JSR, TOK and Merck KGaA holding strong positions across negative and positive thick-film resists, RDL resists, bump plating resists and plating-compatible lithography materials. Merck KGaA's AZ platform covers multiple thick-film and patterning materials; the AZ 15nXT series is described as negative-tone cross-linking photoresists for plating, TSV and RIE etch applications, while AZ P4620 has documented use in copper-plating patterning. These product platforms indicate that advanced packaging photoresists are evolving toward thicker films, electroplating compatibility, easier stripping, lower residue and stronger batch consistency. Chinese suppliers are moving from early validation to localized substitution in selected applications. Aisen Semiconductor Material publicly lists positive photoresist, negative photoresist, developer, Cu etchant and stripper for wafer / advanced packaging applications, and its negative photoresist for advanced packaging is described with single-coating film thickness up to 80 ?m, high contrast, high resolution, good adhesion and high tolerance.

Industry growth will be driven by high-performance computing, AI accelerators, HBM, chiplet integration, advanced packaging capacity expansion, supply-chain security and semiconductor-material localization policies. The U.S. CHIPS for America National Advanced Packaging Manufacturing Program identifies domestic advanced packaging capability as a critical element of semiconductor competitiveness, while the European Chips Act aims to reinforce the semiconductor ecosystem, strengthen supply-chain resilience and reduce external dependencies. These policy directions will support

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investment in advanced packaging capacity, materials validation infrastructure and local supply chains. Technically, shrinking RDL line/space, reduced Cu pillar and micro-bump pitch, denser TSV structures and wider adoption of 2.5D/3D integration will push packaging photoresists toward higher film thickness, higher resolution, broader plating compatibility, lower stripping residue and tighter lot-to-lot consistency. Future competition will therefore shift from single-product substitution toward integrated qualification across positive and negative resist chemistries, developers and strippers, plating processes and customer-specific packaging platforms.

This report studies the global Photoresists for Advanced IC Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photoresists for Advanced IC Packaging 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 Photoresists for Advanced IC Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Photoresists for Advanced IC Packaging total production and demand, 2021-2032, (K Gallon)
Global Photoresists for Advanced IC Packaging total production value, 2021-2032, (USD Million)
Global Photoresists for Advanced IC Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon), (based on production site)
Global Photoresists for Advanced IC Packaging consumption by region & country, CAGR, 2021-2032 & (K Gallon)
U.S. VS China: Photoresists for Advanced IC Packaging domestic production, consumption, key domestic manufacturers and share
Global Photoresists for Advanced IC Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Gallon)
Global Photoresists for Advanced IC Packaging production By Photoresist Tone, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)
Global Photoresists for Advanced IC Packaging production By Packaging Process Step, production, value, CAGR, 2021-2032, (USD Million) & (K Gallon)

This report profiles key players in the global Photoresists for Advanced IC Packaging market based on the following parameters - company overview, production, value, price,

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gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include TOK, JSR, Qnity, Merck KGaA (AZ), Shin-Etsu Chemical, Jiangsu Aisen Semiconductor Material, Allresist GmbH, KemLab™ Inc, Everlight Chemical, NEPES Corporation, 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 Photoresists for Advanced IC Packaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Gallon) and average price (USD/Gallon) by manufacturer, By Photoresist Tone, and By Packaging Process Step. 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 Photoresists for Advanced IC Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photoresists for Advanced IC Packaging Market, Segmentation By Photoresist

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Tone:

Positive-tone Photoresist

Negative-tone Photoresist

Global Photoresists for Advanced IC Packaging Market, Segmentation By Package Platform:

Flip Chip Packaging Photoresist

Wafer-Level Packaging Photoresist

2.5D / 3D Integration Photoresist

Other

Global Photoresists for Advanced IC Packaging Market, Segmentation By End-use:

High-performance Computing / AI Packaging

HBM / Advanced Memory Packaging

Mobile / Consumer Advanced Packaging

Others

Global Photoresists for Advanced IC Packaging Market, Segmentation By Packaging Process Step:

Bump / Cu Pillar Formation

RDL Formation

Other

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Companies Profiled:

TOK

JSR

Qnity

Merck KGaA (AZ)

Shin-Etsu Chemical

Jiangsu Aisen Semiconductor Material

Allresist GmbH

KemLab™ Inc

Everlight Chemical

NEPES Corporation

Futurrex, Inc.

Key Questions Answered:
1. How big is the global Photoresists for Advanced IC Packaging market?
2. What is the demand of the global Photoresists for Advanced IC Packaging market?
3. What is the year over year growth of the global Photoresists for Advanced IC Packaging market?
4. What is the production and production value of the global Photoresists for Advanced IC Packaging market?
5. Who are the key producers in the global Photoresists for Advanced IC Packaging market?
6. What are the growth factors driving the market demand?

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