

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.

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 μ 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

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,

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

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

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?

Contents

1 SUPPLY SUMMARY

- 1.1 Photoresists for Advanced IC Packaging Introduction
- 1.2 World Photoresists for Advanced IC Packaging Supply & Forecast
 - 1.2.1 World Photoresists for Advanced IC Packaging Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.2.3 World Photoresists for Advanced IC Packaging Pricing Trends (2021-2032)
- 1.3 World Photoresists for Advanced IC Packaging Production by Region (Based on Production Site)
 - 1.3.1 World Photoresists for Advanced IC Packaging Production Value by Region (2021-2032)
 - 1.3.2 World Photoresists for Advanced IC Packaging Production by Region (2021-2032)
 - 1.3.3 World Photoresists for Advanced IC Packaging Average Price by Region (2021-2032)
 - 1.3.4 Japan Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.3.5 North America Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.3.6 Europe Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.3.7 China Taiwan Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.3.8 China Mainland Photoresists for Advanced IC Packaging Production (2021-2032)
 - 1.3.9 South Korea Photoresists for Advanced IC Packaging Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Photoresists for Advanced IC Packaging Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Photoresists for Advanced IC Packaging Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Photoresists for Advanced IC Packaging Demand (2021-2032)
- 2.2 World Photoresists for Advanced IC Packaging Consumption by Region
 - 2.2.1 World Photoresists for Advanced IC Packaging Consumption by Region (2021-2026)
 - 2.2.2 World Photoresists for Advanced IC Packaging Consumption Forecast by Region (2027-2032)
- 2.3 United States Photoresists for Advanced IC Packaging Consumption (2021-2032)
- 2.4 China Photoresists for Advanced IC Packaging Consumption (2021-2032)

- 2.5 Europe Photoresists for Advanced IC Packaging Consumption (2021-2032)
- 2.6 Japan Photoresists for Advanced IC Packaging Consumption (2021-2032)
- 2.7 South Korea Photoresists for Advanced IC Packaging Consumption (2021-2032)
- 2.8 ASEAN Photoresists for Advanced IC Packaging Consumption (2021-2032)
- 2.9 India Photoresists for Advanced IC Packaging Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Photoresists for Advanced IC Packaging Production Value by Manufacturer (2021-2026)
- 3.2 World Photoresists for Advanced IC Packaging Production by Manufacturer (2021-2026)
- 3.3 World Photoresists for Advanced IC Packaging Average Price by Manufacturer (2021-2026)
- 3.4 Photoresists for Advanced IC Packaging Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Photoresists for Advanced IC Packaging Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Photoresists for Advanced IC Packaging in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Photoresists for Advanced IC Packaging in 2025
- 3.6 Photoresists for Advanced IC Packaging Market: Overall Company Footprint Analysis
 - 3.6.1 Photoresists for Advanced IC Packaging Market: Region Footprint
 - 3.6.2 Photoresists for Advanced IC Packaging Market: Company Product Type Footprint
 - 3.6.3 Photoresists for Advanced IC Packaging 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: Photoresists for Advanced IC Packaging Production Value

Comparison

4.1.1 United States VS China: Photoresists for Advanced IC Packaging Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Photoresists for Advanced IC Packaging Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Photoresists for Advanced IC Packaging Production Comparison

4.2.1 United States VS China: Photoresists for Advanced IC Packaging Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Photoresists for Advanced IC Packaging Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Photoresists for Advanced IC Packaging Consumption Comparison

4.3.1 United States VS China: Photoresists for Advanced IC Packaging Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Photoresists for Advanced IC Packaging Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Photoresists for Advanced IC Packaging Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Photoresists for Advanced IC Packaging Production Value (2021-2026)

4.4.3 United States Based Manufacturers Photoresists for Advanced IC Packaging Production (2021-2026)

4.5 China Based Photoresists for Advanced IC Packaging Manufacturers and Market Share

4.5.1 China Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Photoresists for Advanced IC Packaging Production Value (2021-2026)

4.5.3 China Based Manufacturers Photoresists for Advanced IC Packaging Production (2021-2026)

4.6 Rest of World Based Photoresists for Advanced IC Packaging Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production (2021-2026)

5 MARKET ANALYSIS BY PHOTORESIST TONE

5.1 World Photoresists for Advanced IC Packaging Market Size Overview By Photoresist Tone: 2021 VS 2025 VS 2032

5.2 Segment Introduction By Photoresist Tone

5.2.1 Positive-tone Photoresist

5.2.2 Negative-tone Photoresist

5.3 Market Segment By Photoresist Tone

5.3.1 World Photoresists for Advanced IC Packaging Production By Photoresist Tone (2021-2032)

5.3.2 World Photoresists for Advanced IC Packaging Production Value By Photoresist Tone (2021-2032)

5.3.3 World Photoresists for Advanced IC Packaging Average Price By Photoresist Tone (2021-2032)

6 MARKET ANALYSIS BY PACKAGE PLATFORM

6.1 World Photoresists for Advanced IC Packaging Market Size Overview By Package Platform: 2021 VS 2025 VS 2032

6.2 Segment Introduction By Package Platform

6.2.1 Flip Chip Packaging Photoresist

6.2.2 Wafer-Level Packaging Photoresist

6.2.3 2.5D / 3D Integration Photoresist

6.2.4 Other

6.3 Market Segment By Package Platform

6.3.1 World Photoresists for Advanced IC Packaging Production By Package Platform (2021-2032)

6.3.2 World Photoresists for Advanced IC Packaging Production Value By Package Platform (2021-2032)

6.3.3 World Photoresists for Advanced IC Packaging Average Price By Package Platform (2021-2032)

7 MARKET ANALYSIS BY END-USE

7.1 World Photoresists for Advanced IC Packaging Market Size Overview By End-use: 2021 VS 2025 VS 2032

7.2 Segment Introduction By End-use

7.2.1 High-performance Computing / AI Packaging

7.2.2 HBM / Advanced Memory Packaging

7.2.3 Mobile / Consumer Advanced Packaging

7.2.4 Others

7.3 Market Segment By End-use

7.3.1 World Photoresists for Advanced IC Packaging Production By End-use (2021-2032)

7.3.2 World Photoresists for Advanced IC Packaging Production Value By End-use (2021-2032)

7.3.3 World Photoresists for Advanced IC Packaging Average Price By End-use (2021-2032)

8 MARKET ANALYSIS BY PACKAGING PROCESS STEP

8.1 World Photoresists for Advanced IC Packaging Market Size Overview By Packaging Process Step: 2021 VS 2025 VS 2032

8.2 Segment Introduction By Packaging Process Step

8.2.1 Bump / Cu Pillar Formation

8.2.2 RDL Formation

8.2.3 Other

8.3 Market Segment By Packaging Process Step

8.3.1 World Photoresists for Advanced IC Packaging Production By Packaging Process Step (2021-2032)

8.3.2 World Photoresists for Advanced IC Packaging Production Value By Packaging Process Step (2021-2032)

8.3.3 World Photoresists for Advanced IC Packaging Average Price By Packaging Process Step (2021-2032)

9 COMPANY PROFILES

9.1 TOK

9.1.1 TOK Details

9.1.2 TOK Major Business

9.1.3 TOK Photoresists for Advanced IC Packaging Product and Services

9.1.4 TOK Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 TOK Recent Developments/Updates

9.1.6 TOK Competitive Strengths & Weaknesses

9.2 JSR

9.2.1 JSR Details

9.2.2 JSR Major Business

9.2.3 JSR Photoresists for Advanced IC Packaging Product and Services

9.2.4 JSR Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 JSR Recent Developments/Updates

9.2.6 JSR Competitive Strengths & Weaknesses

9.3 Qnity

9.3.1 Qnity Details

9.3.2 Qnity Major Business

9.3.3 Qnity Photoresists for Advanced IC Packaging Product and Services

9.3.4 Qnity Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Qnity Recent Developments/Updates

9.3.6 Qnity Competitive Strengths & Weaknesses

9.4 Merck KGaA (AZ)

9.4.1 Merck KGaA (AZ) Details

9.4.2 Merck KGaA (AZ) Major Business

9.4.3 Merck KGaA (AZ) Photoresists for Advanced IC Packaging Product and Services

9.4.4 Merck KGaA (AZ) Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Merck KGaA (AZ) Recent Developments/Updates

9.4.6 Merck KGaA (AZ) Competitive Strengths & Weaknesses

9.5 Shin-Etsu Chemical

9.5.1 Shin-Etsu Chemical Details

9.5.2 Shin-Etsu Chemical Major Business

9.5.3 Shin-Etsu Chemical Photoresists for Advanced IC Packaging Product and Services

9.5.4 Shin-Etsu Chemical Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Shin-Etsu Chemical Recent Developments/Updates

9.5.6 Shin-Etsu Chemical Competitive Strengths & Weaknesses

9.6 Jiangsu Aisen Semiconductor Material

9.6.1 Jiangsu Aisen Semiconductor Material Details

9.6.2 Jiangsu Aisen Semiconductor Material Major Business

9.6.3 Jiangsu Aisen Semiconductor Material Photoresists for Advanced IC Packaging Product and Services

9.6.4 Jiangsu Aisen Semiconductor Material Photoresists for Advanced IC Packaging

Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Jiangsu Aisen Semiconductor Material Recent Developments/Updates

9.6.6 Jiangsu Aisen Semiconductor Material Competitive Strengths & Weaknesses

9.7 Allresist GmbH

9.7.1 Allresist GmbH Details

9.7.2 Allresist GmbH Major Business

9.7.3 Allresist GmbH Photoresists for Advanced IC Packaging Product and Services

9.7.4 Allresist GmbH Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Allresist GmbH Recent Developments/Updates

9.7.6 Allresist GmbH Competitive Strengths & Weaknesses

9.8 KemLab™ Inc

9.8.1 KemLab™ Inc Details

9.8.2 KemLab™ Inc Major Business

9.8.3 KemLab™ Inc Photoresists for Advanced IC Packaging Product and Services

9.8.4 KemLab™ Inc Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 KemLab™ Inc Recent Developments/Updates

9.8.6 KemLab™ Inc Competitive Strengths & Weaknesses

9.9 Everlight Chemical

9.9.1 Everlight Chemical Details

9.9.2 Everlight Chemical Major Business

9.9.3 Everlight Chemical Photoresists for Advanced IC Packaging Product and Services

9.9.4 Everlight Chemical Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Everlight Chemical Recent Developments/Updates

9.9.6 Everlight Chemical Competitive Strengths & Weaknesses

9.10 NEPES Corporation

9.10.1 NEPES Corporation Details

9.10.2 NEPES Corporation Major Business

9.10.3 NEPES Corporation Photoresists for Advanced IC Packaging Product and Services

9.10.4 NEPES Corporation Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 NEPES Corporation Recent Developments/Updates

9.10.6 NEPES Corporation Competitive Strengths & Weaknesses

9.11 Futurrex, Inc.

9.11.1 Futurrex, Inc. Details

- 9.11.2 Futurrex, Inc. Major Business
- 9.11.3 Futurrex, Inc. Photoresists for Advanced IC Packaging Product and Services
- 9.11.4 Futurrex, Inc. Photoresists for Advanced IC Packaging Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Futurrex, Inc. Recent Developments/Updates
- 9.11.6 Futurrex, Inc. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Photoresists for Advanced IC Packaging Industry Chain
- 10.2 Photoresists for Advanced IC Packaging Upstream Analysis
 - 10.2.1 Photoresists for Advanced IC Packaging Core Raw Materials
 - 10.2.2 Main Manufacturers of Photoresists for Advanced IC Packaging Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Photoresists for Advanced IC Packaging Production Mode
- 10.6 Photoresists for Advanced IC Packaging Procurement Model
- 10.7 Photoresists for Advanced IC Packaging Industry Sales Model and Sales Channels
 - 10.7.1 Photoresists for Advanced IC Packaging Sales Model
 - 10.7.2 Photoresists for Advanced IC Packaging Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Photoresists for Advanced IC Packaging Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Photoresists for Advanced IC Packaging Production Value by Region (2021-2026) & (USD Million)

Table 3. World Photoresists for Advanced IC Packaging Production Value by Region (2027-2032) & (USD Million)

Table 4. World Photoresists for Advanced IC Packaging Production Value Market Share by Region (2021-2026)

Table 5. World Photoresists for Advanced IC Packaging Production Value Market Share by Region (2027-2032)

Table 6. World Photoresists for Advanced IC Packaging Production by Region (2021-2026) & (K Gallon)

Table 7. World Photoresists for Advanced IC Packaging Production by Region (2027-2032) & (K Gallon)

Table 8. World Photoresists for Advanced IC Packaging Production Market Share by Region (2021-2026)

Table 9. World Photoresists for Advanced IC Packaging Production Market Share by Region (2027-2032)

Table 10. World Photoresists for Advanced IC Packaging Average Price by Region (2021-2026) & (USD/Gallon)

Table 11. World Photoresists for Advanced IC Packaging Average Price by Region (2027-2032) & (USD/Gallon)

Table 12. Photoresists for Advanced IC Packaging Major Market Trends

Table 13. World Photoresists for Advanced IC Packaging Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Gallon)

Table 14. World Photoresists for Advanced IC Packaging Consumption by Region (2021-2026) & (K Gallon)

Table 15. World Photoresists for Advanced IC Packaging Consumption Forecast by Region (2027-2032) & (K Gallon)

Table 16. World Photoresists for Advanced IC Packaging Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Photoresists for Advanced IC Packaging Producers in 2025

Table 18. World Photoresists for Advanced IC Packaging Production by Manufacturer (2021-2026) & (K Gallon)

Table 19. Production Market Share of Key Photoresists for Advanced IC Packaging Producers in 2025

Table 20. World Photoresists for Advanced IC Packaging Average Price by Manufacturer (2021-2026) & (USD/Gallon)

Table 21. Global Photoresists for Advanced IC Packaging Company Evaluation Quadrant

Table 22. World Photoresists for Advanced IC Packaging Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Photoresists for Advanced IC Packaging Production Site of Key Manufacturer

Table 24. Photoresists for Advanced IC Packaging Market: Company Product Type Footprint

Table 25. Photoresists for Advanced IC Packaging Market: Company Product Application Footprint

Table 26. Photoresists for Advanced IC Packaging Competitive Factors

Table 27. Photoresists for Advanced IC Packaging New Entrant and Capacity Expansion Plans

Table 28. Photoresists for Advanced IC Packaging Mergers & Acquisitions Activity

Table 29. United States VS China Photoresists for Advanced IC Packaging Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Photoresists for Advanced IC Packaging Production Comparison, (2021 & 2025 & 2032) & (K Gallon)

Table 31. United States VS China Photoresists for Advanced IC Packaging Consumption Comparison, (2021 & 2025 & 2032) & (K Gallon)

Table 32. United States Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Photoresists for Advanced IC Packaging Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Photoresists for Advanced IC Packaging Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Photoresists for Advanced IC Packaging Production (2021-2026) & (K Gallon)

Table 36. United States Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share (2021-2026)

Table 37. China Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Photoresists for Advanced IC Packaging Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Photoresists for Advanced IC Packaging

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Photoresists for Advanced IC Packaging Production, (2021-2026) & (K Gallon)

Table 41. China Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share (2021-2026)

Table 42. Rest of World Based Photoresists for Advanced IC Packaging Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production, (2021-2026) & (K Gallon)

Table 46. Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share (2021-2026)

Table 47. World Photoresists for Advanced IC Packaging Production Value By Photoresist Tone, (USD Million), 2021 & 2025 & 2032

Table 48. World Photoresists for Advanced IC Packaging Production By Photoresist Tone (2021-2026) & (K Gallon)

Table 49. World Photoresists for Advanced IC Packaging Production By Photoresist Tone (2027-2032) & (K Gallon)

Table 50. World Photoresists for Advanced IC Packaging Production Value By Photoresist Tone (2021-2026) & (USD Million)

Table 51. World Photoresists for Advanced IC Packaging Production Value By Photoresist Tone (2027-2032) & (USD Million)

Table 52. World Photoresists for Advanced IC Packaging Average Price By Photoresist Tone (2021-2026) & (USD/Gallon)

Table 53. World Photoresists for Advanced IC Packaging Average Price By Photoresist Tone (2027-2032) & (USD/Gallon)

Table 54. World Photoresists for Advanced IC Packaging Production Value By Package Platform, (USD Million), 2021 & 2025 & 2032

Table 55. World Photoresists for Advanced IC Packaging Production By Package Platform (2021-2026) & (K Gallon)

Table 56. World Photoresists for Advanced IC Packaging Production By Package Platform (2027-2032) & (K Gallon)

Table 57. World Photoresists for Advanced IC Packaging Production Value By Package Platform (2021-2026) & (USD Million)

Table 58. World Photoresists for Advanced IC Packaging Production Value By Package Platform (2027-2032) & (USD Million)

Table 59. World Photoresists for Advanced IC Packaging Average Price By Package Platform (2021-2026) & (USD/Gallon)

Table 60. World Photoresists for Advanced IC Packaging Average Price By Package Platform (2027-2032) & (USD/Gallon)

Table 61. World Photoresists for Advanced IC Packaging Production Value By End-use, (USD Million), 2021 & 2025 & 2032

Table 62. World Photoresists for Advanced IC Packaging Production By End-use (2021-2026) & (K Gallon)

Table 63. World Photoresists for Advanced IC Packaging Production By End-use (2027-2032) & (K Gallon)

Table 64. World Photoresists for Advanced IC Packaging Production Value By End-use (2021-2026) & (USD Million)

Table 65. World Photoresists for Advanced IC Packaging Production Value By End-use (2027-2032) & (USD Million)

Table 66. World Photoresists for Advanced IC Packaging Average Price By End-use (2021-2026) & (USD/Gallon)

Table 67. World Photoresists for Advanced IC Packaging Average Price By End-use (2027-2032) & (USD/Gallon)

Table 68. World Photoresists for Advanced IC Packaging Production Value By Packaging Process Step, (USD Million), 2021 & 2025 & 2032

Table 69. World Photoresists for Advanced IC Packaging Production By Packaging Process Step (2021-2026) & (K Gallon)

Table 70. World Photoresists for Advanced IC Packaging Production By Packaging Process Step (2027-2032) & (K Gallon)

Table 71. World Photoresists for Advanced IC Packaging Production Value By Packaging Process Step (2021-2026) & (USD Million)

Table 72. World Photoresists for Advanced IC Packaging Production Value By Packaging Process Step (2027-2032) & (USD Million)

Table 73. World Photoresists for Advanced IC Packaging Average Price By Packaging Process Step (2021-2026) & (USD/Gallon)

Table 74. World Photoresists for Advanced IC Packaging Average Price By Packaging Process Step (2027-2032) & (USD/Gallon)

Table 75. TOK Basic Information, Manufacturing Base and Competitors

Table 76. TOK Major Business

Table 77. TOK Photoresists for Advanced IC Packaging Product and Services

Table 78. TOK Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. TOK Recent Developments/Updates

- Table 80. TOK Competitive Strengths & Weaknesses
- Table 81. JSR Basic Information, Manufacturing Base and Competitors
- Table 82. JSR Major Business
- Table 83. JSR Photoresists for Advanced IC Packaging Product and Services
- Table 84. JSR Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. JSR Recent Developments/Updates
- Table 86. JSR Competitive Strengths & Weaknesses
- Table 87. Qnity Basic Information, Manufacturing Base and Competitors
- Table 88. Qnity Major Business
- Table 89. Qnity Photoresists for Advanced IC Packaging Product and Services
- Table 90. Qnity Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Qnity Recent Developments/Updates
- Table 92. Qnity Competitive Strengths & Weaknesses
- Table 93. Merck KGaA (AZ) Basic Information, Manufacturing Base and Competitors
- Table 94. Merck KGaA (AZ) Major Business
- Table 95. Merck KGaA (AZ) Photoresists for Advanced IC Packaging Product and Services
- Table 96. Merck KGaA (AZ) Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Merck KGaA (AZ) Recent Developments/Updates
- Table 98. Merck KGaA (AZ) Competitive Strengths & Weaknesses
- Table 99. Shin-Etsu Chemical Basic Information, Manufacturing Base and Competitors
- Table 100. Shin-Etsu Chemical Major Business
- Table 101. Shin-Etsu Chemical Photoresists for Advanced IC Packaging Product and Services
- Table 102. Shin-Etsu Chemical Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Shin-Etsu Chemical Recent Developments/Updates
- Table 104. Shin-Etsu Chemical Competitive Strengths & Weaknesses
- Table 105. Jiangsu Aisen Semiconductor Material Basic Information, Manufacturing Base and Competitors
- Table 106. Jiangsu Aisen Semiconductor Material Major Business
- Table 107. Jiangsu Aisen Semiconductor Material Photoresists for Advanced IC

Packaging Product and Services

Table 108. Jiangsu Aisen Semiconductor Material Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Jiangsu Aisen Semiconductor Material Recent Developments/Updates

Table 110. Jiangsu Aisen Semiconductor Material Competitive Strengths & Weaknesses

Table 111. Allresist GmbH Basic Information, Manufacturing Base and Competitors

Table 112. Allresist GmbH Major Business

Table 113. Allresist GmbH Photoresists for Advanced IC Packaging Product and Services

Table 114. Allresist GmbH Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Allresist GmbH Recent Developments/Updates

Table 116. Allresist GmbH Competitive Strengths & Weaknesses

Table 117. KemLab™ Inc Basic Information, Manufacturing Base and Competitors

Table 118. KemLab™ Inc Major Business

Table 119. KemLab™ Inc Photoresists for Advanced IC Packaging Product and Services

Table 120. KemLab™ Inc Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. KemLab™ Inc Recent Developments/Updates

Table 122. KemLab™ Inc Competitive Strengths & Weaknesses

Table 123. Everlight Chemical Basic Information, Manufacturing Base and Competitors

Table 124. Everlight Chemical Major Business

Table 125. Everlight Chemical Photoresists for Advanced IC Packaging Product and Services

Table 126. Everlight Chemical Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Everlight Chemical Recent Developments/Updates

Table 128. Everlight Chemical Competitive Strengths & Weaknesses

Table 129. NEPES Corporation Basic Information, Manufacturing Base and Competitors

Table 130. NEPES Corporation Major Business

Table 131. NEPES Corporation Photoresists for Advanced IC Packaging Product and Services

Table 132. NEPES Corporation Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 133. NEPES Corporation Recent Developments/Updates

Table 134. NEPES Corporation Competitive Strengths & Weaknesses

Table 135. Futurrex, Inc. Basic Information, Manufacturing Base and Competitors

Table 136. Futurrex, Inc. Major Business

Table 137. Futurrex, Inc. Photoresists for Advanced IC Packaging Product and Services

Table 138. Futurrex, Inc. Photoresists for Advanced IC Packaging Production (K Gallon), Price (USD/Gallon), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Futurrex, Inc. Recent Developments/Updates

Table 140. Futurrex, Inc. Competitive Strengths & Weaknesses

Table 141. Global Key Players of Photoresists for Advanced IC Packaging Upstream (Raw Materials)

Table 142. Global Photoresists for Advanced IC Packaging Typical Customers

Table 143. Photoresists for Advanced IC Packaging Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Photoresists for Advanced IC Packaging Picture

Figure 2. World Photoresists for Advanced IC Packaging Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Photoresists for Advanced IC Packaging Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 5. World Photoresists for Advanced IC Packaging Average Price (2021-2032) & (USD/Gallon)

Figure 6. World Photoresists for Advanced IC Packaging Production Value Market Share by Region (2021-2032)

Figure 7. World Photoresists for Advanced IC Packaging Production Market Share by Region (2021-2032)

Figure 8. Japan Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 9. North America Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 10. Europe Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 11. China Taiwan Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 12. China Mainland Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 13. South Korea Photoresists for Advanced IC Packaging Production (2021-2032) & (K Gallon)

Figure 14. Photoresists for Advanced IC Packaging Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 17. World Photoresists for Advanced IC Packaging Consumption Market Share by Region (2021-2032)

Figure 18. United States Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 19. China Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 20. Europe Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 21. Japan Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 22. South Korea Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 23. ASEAN Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 24. India Photoresists for Advanced IC Packaging Consumption (2021-2032) & (K Gallon)

Figure 25. Producer Shipments of Photoresists for Advanced IC Packaging by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Photoresists for Advanced IC Packaging Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Photoresists for Advanced IC Packaging Markets in 2025

Figure 28. United States VS China: Photoresists for Advanced IC Packaging Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Photoresists for Advanced IC Packaging Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Photoresists for Advanced IC Packaging Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share 2025

Figure 32. China Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Photoresists for Advanced IC Packaging Production Market Share 2025

Figure 34. World Photoresists for Advanced IC Packaging Production Value By Photoresist Tone, (USD Million), 2021 & 2025 & 2032

Figure 35. World Photoresists for Advanced IC Packaging Production Value Market Share By Photoresist Tone in 2025

Figure 36. Positive-tone Photoresist

Figure 37. Negative-tone Photoresist

Figure 38. World Photoresists for Advanced IC Packaging Production Market Share By Photoresist Tone (2021-2032)

Figure 39. World Photoresists for Advanced IC Packaging Production Value Market Share By Photoresist Tone (2021-2032)

Figure 40. World Photoresists for Advanced IC Packaging Average Price By Photoresist

Tone (2021-2032) & (USD/Gallon)

Figure 41. World Photoresists for Advanced IC Packaging Production Value By Package Platform, (USD Million), 2021 & 2025 & 2032

Figure 42. World Photoresists for Advanced IC Packaging Production Value Market Share By Package Platform in 2025

Figure 43. Flip Chip Packaging Photoresist

Figure 44. Wafer-Level Packaging Photoresist

Figure 45. 2.5D / 3D Integration Photoresist

Figure 46. Other

Figure 47. World Photoresists for Advanced IC Packaging Production Market Share By Package Platform (2021-2032)

Figure 48. World Photoresists for Advanced IC Packaging Production Value Market Share By Package Platform (2021-2032)

Figure 49. World Photoresists for Advanced IC Packaging Average Price By Package Platform (2021-2032) & (USD/Gallon)

Figure 50. World Photoresists for Advanced IC Packaging Production Value By End-use, (USD Million), 2021 & 2025 & 2032

Figure 51. World Photoresists for Advanced IC Packaging Production Value Market Share By End-use in 2025

Figure 52. High-performance Computing / AI Packaging

Figure 53. HBM / Advanced Memory Packaging

Figure 54. Mobile / Consumer Advanced Packaging

Figure 55. Others

Figure 56. World Photoresists for Advanced IC Packaging Production Market Share By End-use (2021-2032)

Figure 57. World Photoresists for Advanced IC Packaging Production Value Market Share By End-use (2021-2032)

Figure 58. World Photoresists for Advanced IC Packaging Average Price By End-use (2021-2032) & (USD/Gallon)

Figure 59. World Photoresists for Advanced IC Packaging Production Value By Packaging Process Step, (USD Million), 2021 & 2025 & 2032

Figure 60. World Photoresists for Advanced IC Packaging Production Value Market Share By Packaging Process Step in 2025

Figure 61. Bump / Cu Pillar Formation

Figure 62. RDL Formation

Figure 63. Other

Figure 64. World Photoresists for Advanced IC Packaging Production Market Share By Packaging Process Step (2021-2032)

Figure 65. World Photoresists for Advanced IC Packaging Production Value Market

Share By Packaging Process Step (2021-2032)

Figure 66. World Photoresists for Advanced IC Packaging Average Price By Packaging Process Step (2021-2032) & (USD/Gallon)

Figure 67. Photoresists for Advanced IC Packaging Industry Chain

Figure 68. Photoresists for Advanced IC Packaging Procurement Model

Figure 69. Photoresists for Advanced IC Packaging Sales Model

Figure 70. Photoresists for Advanced IC Packaging Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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