

# Global Photoresists 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 Photoresists market size was valued at US\$ 7512 million in 2025 and is forecast to a readjusted size of US\$ 11090 million by 2032 with a CAGR of 5.8% during review period.

Photoresist (PR) is a polymeric compound that changes properties when exposed to certain wavelengths of light to form specific patterns on substrate surfaces. PR is a key material for photolithography in the TFT-LCD manufacturing process.

In 2024, the global semiconductor photoresist market (including EUV photoresist, ArF photoresist, KrF photoresist, and i/g-line photoresist) stood at USD 2.99 billion, and is projected to reach USD 5.09 billion by 2032, registering a CAGR of 6.54% from 2026 to 2032.

The global display panel photoresist market (including color photoresist, black photoresist, touch panel photoresist, and TFT-LCD photoresist) was valued at USD 1.81 billion in 2024, and it is anticipated to reach USD 2.43 billion by 2032, with a CAGR of 3.67% for the period 2026-2032.

In 2024, the global PCB photoresist market (including dry film photoresist, solder mask ink, and liquid photoresist) reached USD 1.89 billion, and it is forecasted to grow to USD 3.29 billion by 2032, at a CAGR of 7.1% from 2026 to 2032.

In terms of semiconductor photoresist, the core manufacturers are currently producers from Japan, the United States, and South Korea, including Tokyo Ohka Kogyo (TOK), JSR, Shin-Etsu Chemical, Qnity, Fujifilm, Sumitomo Chemical, and Dongjin Semichem of South Korea. In 2024, the top six semiconductor photoresist producers accounted for

approximately 84.6% of the global market share. In the domestic Chinese market, the major manufacturers include Reform Technology (with its subsidiary Beijing Kehua Microelectronics), Jiangsu Jingrui Electronic Materials, Xuzhou Bokang Information Chemicals Co., Ltd., Hengkun New Materials, Jiangsu Aisen Semiconductor Materials Co., Ltd., Zhuhai Jishi, Shanghai Sinyang Semiconductor Materials Co., Ltd., Rongda Photosensitive Materials, Beijing Xinyihua Technology Co., Ltd., Guoke Tianji, Jiangsu Nata Opto-electronic Material Co., Ltd., and Feikai Materials.

For display panel photoresist, the leading manufacturers include Fujifilm, Sumitomo Chemical, Dongjin Semichem, Merck KGaA (AZ), JSR, Nippon Steel Chemical, Yake Technology, DNP Fine Chemicals, Reform Technology (with its subsidiary Beijing Beixu Electronics), and Beijing Xinyihua Technology Co., Ltd. In 2024, the top seven global manufacturers held about 71.8% of the market share.

Regarding PCB photoresist, the core manufacturers of PCB dry film photoresist include Asahi Kasei, Eternal Materials, Resonac, Chang Chun Group, Kolon Industries, Mitsubishi Paper Mills Limited, Qnity, Hunan Chuyuan New Materials Co., Ltd., and Hangzhou First Applied Material Co., Ltd. In 2024, the top six global manufacturers accounted for approximately 67% of the market share. For PCB solder mask ink, the key manufacturers mainly include Taiyo Ink, Rongda Photosensitive Materials, Guangxin Materials, and Resonac, with the top three manufacturers holding 72% of the market share in 2024.

From the consumption perspective, China is currently the world's largest photoresist consumer market, accounting for 34.7% of the global market share in 2024, followed by China's Taiwan region and South Korea, with shares of 20.67% and 19.36% respectively.

On the production side, Japan, North America, China's Taiwan region, South Korea, and mainland China are the major photoresist production regions. In 2024, they accounted for 53.93%, 8.54%, 11.50%, 9.36%, and 9.01% of the global market share respectively. It is expected that in the next few years, the Chinese market will maintain the fastest growth rate, with its share projected to reach 12.43% by 2032.

In terms of product types, semiconductor photoresist is the largest sub-category, accounting for 44.64% of the total photoresist market share in 2024, and this proportion is expected to rise to 47.26% by 2031. The semiconductor photoresist is expected to achieve a CAGR of approximately 6.54% during 2026-2032.

From the perspective of the global supply and demand structure of semiconductor photoresist (including supporting lithography materials such as developers and cleaning agents), the industry is characterized by 'moderate overall volume recovery and structural shift towards advanced processes' in 2024-2025. The global semiconductor photoresist market reached USD 2.991 billion in 2024 and is projected to hit USD 4.883 billion by 2031, with a CAGR of 6.54% from 2025 to 2031. Among them, EUV photoresist is the fastest-growing sub-category, while the demand for mature photoresists such as KrF and ArF is driven more by the increase in the number of layers of 3D NAND and the recovery of capacity utilization in memory and some mature logic processes. On the supply side, photoresist is a typical material featuring 'strong certification requirements and tight process coupling'. The formula (resins, solvents, photoacid generators (PAGs), quenchers, etc.), coating thickness uniformity, defect density, metal ion control, and coordination with exposure/development windows all require long-term joint development and verification with wafer fabs, resulting in a naturally high degree of industry concentration. Manufacturers from Japan, South Korea, and the United States have long occupied a key position in high-end photoresist (especially EUV photoresist). In 2024, Japanese manufacturers accounted for 75% of the global market share, followed by U.S. manufacturers with 12.25%, South Korean manufacturers with 4.99%, and European manufacturers with 4.21%. Domestic Chinese manufacturers only held a 2.68% share of the global market in 2024. Leading global enterprises are also continuously expanding production capacity and global delivery systems to serve customers in North America, Europe, and Asia.

Looking ahead to the next 2-5 years, the core growth drivers of semiconductor photoresist will revolve around the process evolution of advanced logic/advanced memory, the material iteration of EUV/High-NA, and the demand expansion of 'thick-film/multi-layer lithography' brought by advanced packaging. On one hand, AI/HPC is driving the expansion of advanced logic (3nm - 2nm/-class) production capacity, and the penetration rate of EUV in key layers will continue to increase. High-NA EUV is widely regarded by the industry to enter a more substantial mass production introduction window around 2026, which will shift the focus of materials to 'lower stochastic defects, higher resolution/lower line edge roughness (LER), improved sensitivity at acceptable doses, and adaptation to new photomasks/exposure conditions'. This will promote the further evolution of EUV photoresist from the traditional chemically amplified photoresist system to new systems such as metal oxide resist (MOR) and the coordination with supporting processes (e.g., JSR's acquisition of Inpria to strengthen its layout of EUV metal oxide photoresist). On the other hand, in the process of DRAM miniaturization and continuous stacking of 3D NAND, DUV photoresist will maintain a 'large and stable' market base, and benefit from the demand

for multi-patterning and yield repair in specific process steps. Meanwhile, advanced packaging (RDL, Fan-Out, WLP, etc.) is increasing the usage intensity of thick-film photoresist/dry film/dry lithography, and new routes such as 'dry resist' are being introduced to reduce the defects and cost pressure caused by multiple wet coating processes. Representative equipment and process ecosystems are also advancing verification and mass production. Key external variables to focus on include: geopolitics and supply security (long certification cycles lead to weak short-term substitution elasticity, and the construction of regional/localized production capacity and formula systems will continue to accelerate), as well as environmental and compliance constraints (multiple studies have emphasized the irreplaceability of PFAS (Per- and Polyfluoroalkyl Substances) and other fluorine-containing chemicals in key semiconductor materials. If regulations in regions such as the EU become stricter, it will force material manufacturers to carry out formula restructuring, supply chain compliance, and alternative path research and development, but it may also lead to cost and delivery cycle fluctuations in the short term).

This report is a detailed and comprehensive analysis for global Photoresists market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Imaging Mechanism 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 Photoresists market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Photoresists market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Photoresists market size and forecasts, by Imaging Mechanism and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Photoresists market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Kg), 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 Photoresists

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 Photoresists 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, 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.

## Market Segmentation

Photoresists market is split by Imaging Mechanism and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Imaging Mechanism, 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 Imaging Mechanism

Positive Photoresists

Negative Photoresists

Market segment by Type

EUV Photoresist

ArFi Photoresist

ArF Dry Photoresist

KrF Photoresist

g/i-Line

Others

#### Market segment by Process Node

High End / Advanced 110nm

DRAM and NAND

#### Market segment by Application

Semiconductor Photoresists

LCD Photoresists

PCB Photoresists

#### Major players covered

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

NIPPON STEEL Chemical & Material

Jiangsu Yoke Technology

DNP Fine Chemicals

Chimei

Daxin Materials

Jiangsu Kuangshun

Eternal Material Technology

Samsung SDI

Taiyo Ink MFG

Asahi Kasei

Eternal Materials

Resonac

Chang Chun Group

Kolon Industries

Mitsubishi Paper Mills Limited

SAN-EI KAGAKU

Huntsman

Onstatic Technology

Hunan Initial New Materials

Hangzhou First Applied Material

Hubei Dinglong Holding

Lam Research

Tianjin Jiuri New Material

Zeon Corporation

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 Photoresists product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Photoresists 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 Imaging Mechanism and by Application, with sales market share and growth rate by Imaging Mechanism, 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 Photoresists market forecast, by regions, by Imaging Mechanism, 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 Photoresists.

Chapter 14 and 15, to describe Photoresists sales channel, distributors, customers, research findings and conclusion.

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