

# Global Polymer-Bound Photoacid Generator (PAG) Materials Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Polymer-Bound Photoacid Generator (PAG) Materials market size is expected to reach \$ 726 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

In 2025, the global PAG-type polymer materials industry is expected to maintain an average gross margin in the range of 35%–50%. These materials refer to functional polymer systems in which photoacid-generating moieties are chemically incorporated into the polymer backbone or side chains through copolymerization, grafting, or covalent bonding, forming a critical component of chemically amplified photoresponsive materials. Typical product forms include PAG-containing polymer resins, polymerizable PAG-derived macromolecules, and hybrid photoactive polymer systems, generally supplied as high-purity solid resins or formulated solutions. From a manufacturing perspective, these materials require advanced organic synthesis, controlled radical or ionic polymerization, and ultra-high purity electronic chemical processing, with precise control over key parameters such as molecular weight distribution (Mw/Mn), acid diffusion length, and trace metal contamination at ppb levels. Functionally, polymer-bound PAG materials generate acidic species upon light exposure, initiating chemically amplified reactions that enable high-resolution pattern transfer or rapid crosslinking and curing. This study primarily focuses on applications in semiconductor photoresists, display lithographic materials, and UV-curable systems such as coatings, inks, and additive manufacturing, representing a key class of functional materials in advanced microfabrication and photopolymerization industries.

According to our research, polymer-bound photoacid generator (PAG) materials occupy a unique position at the intersection of core functional components in photoresist

systems and key initiating agents in UV-curable materials, representing a highly specialized segment within the broader electronic chemicals industry characterized by small market size, high technical barriers, and strong value concentration. From a supply-side perspective, the global market exhibits a distinct structure dominated by Japanese players, with South Korean companies rapidly advancing and Chinese suppliers accelerating their entry. Established suppliers maintain strong technological capabilities and long-term customer relationships in advanced semiconductor applications, while emerging players are more active in display and UV-curable segments, gradually expanding toward higher-end nodes. This results in a layered industry structure where the core formal supplier group is relatively concentrated, whereas the broader supplier base is more fragmented and application-diversified. From a demand standpoint, advanced logic and memory manufacturing—particularly driven by EUV and ArF lithography—serve as the primary growth engine, while display panel production and UV-curable applications provide a stable demand base that supports overall market expansion. From an industry dynamics perspective, ongoing investments in semiconductor material localization, supply chain security, and capacity expansion are reshaping regional supply patterns, accompanied by selective mergers, acquisitions, and technical collaborations that reinforce high-end market concentration. From a product evolution standpoint, PAG materials are increasingly shifting toward polymer-bound architectures with lower acid diffusion, higher resolution, and reduced contamination, further raising technical entry barriers. Overall, the industry remains in a growth phase, benefiting from semiconductor cycle recovery and localization trends, while facing challenges such as stringent qualification requirements, long validation cycles, and high downstream customer concentration.

This report studies the global Polymer-Bound Photoacid Generator (PAG) Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polymer-Bound Photoacid Generator (PAG) Materials 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 Polymer-Bound Photoacid Generator (PAG) Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polymer-Bound Photoacid Generator (PAG) Materials total production and demand, 2021-2032, (kg)

Global Polymer-Bound Photoacid Generator (PAG) Materials total production value,

2021-2032, (USD Million)

Global Polymer-Bound Photoacid Generator (PAG) Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Polymer-Bound Photoacid Generator (PAG) Materials consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Polymer-Bound Photoacid Generator (PAG) Materials domestic production, consumption, key domestic manufacturers and share

Global Polymer-Bound Photoacid Generator (PAG) Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Polymer-Bound Photoacid Generator (PAG) Materials production by Exposure Wavelength, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Polymer-Bound Photoacid Generator (PAG) Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Polymer-Bound Photoacid Generator (PAG) Materials 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 JSR Corporation, Tokyo Ohka Kogyo, Shin-Etsu Chemical, Sumitomo Chemical, Fujifilm Corporation, Merck KGaA, DuPont, Dongjin Semichem, Samyang NC Chem Co., Ltd., Heraeus Epurio, 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 Polymer-Bound Photoacid Generator (PAG) Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) by manufacturer, by Exposure Wavelength, 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 Polymer-Bound Photoacid Generator (PAG) Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Polymer-Bound Photoacid Generator (PAG) Materials Market, Segmentation by Exposure Wavelength:

Electronic Grade (Ultra-low Metal Impurities, ?10 ppb per metal, ?1 ppm total)

Industrial Grade (Metal Impurities typically 10–100 ppm)

Research Grade (Laboratory Grade, Non-standardized Impurity Control)

Others

## Global Polymer-Bound Photoacid Generator (PAG) Materials Market, Segmentation by Application:

Semiconductor Industry

Display Industry

Printing & Coatings

Additive Manufacturing

Others

Companies Profiled:

JSR Corporation

Tokyo Ohka Kogyo

Shin-Etsu Chemical

Sumitomo Chemical

Fujifilm Corporation

Merck KGaA

DuPont

Dongjin Semichem

Samyang NC Chem Co., Ltd.

Heraeus Epurio

Osaka Organic Chemical

Central Glass

ADEKA Corporation

DIC Corporation

Toray Industries

Mitsubishi Chemical Group

Sumitomo Bakelite

Kanto Chemical

Tokyo Chemical Industry

Kayaku Advanced Materials

Brewer Science

Allresist GmbH

LG Chem

Chemax Co., Ltd.

ENF Technology Co., Ltd.

DNF Co., Ltd.

Miwon Commercial Co., Ltd.

Hubei Dinglong Co., Ltd.

Suzhou Ruihong Electronic Chemicals Co., Ltd.

Beijing Kehua Microelectronics Materials Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

Crystal Clear Electronic Material Co., Ltd.

Suzhou Weimas Semiconductor Materials Co., Ltd.

Xuzhou B & C Chemical Co., Ltd.

Key Questions Answered:

1. How big is the global Polymer-Bound Photoacid Generator (PAG) Materials market?
2. What is the demand of the global Polymer-Bound Photoacid Generator (PAG) Materials market?
3. What is the year over year growth of the global Polymer-Bound Photoacid Generator (PAG) Materials market?
4. What is the production and production value of the global Polymer-Bound Photoacid Generator (PAG) Materials market?
5. Who are the key producers in the global Polymer-Bound Photoacid Generator (PAG) Materials market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Polymer-Bound Photoacid Generator (PAG) Materials Introduction
- 1.2 World Polymer-Bound Photoacid Generator (PAG) Materials Supply & Forecast
  - 1.2.1 World Polymer-Bound Photoacid Generator (PAG) Materials Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032)
  - 1.2.3 World Polymer-Bound Photoacid Generator (PAG) Materials Pricing Trends (2021-2032)
- 1.3 World Polymer-Bound Photoacid Generator (PAG) Materials Production by Region (Based on Production Site)
  - 1.3.1 World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Region (2021-2032)
  - 1.3.2 World Polymer-Bound Photoacid Generator (PAG) Materials Production by Region (2021-2032)
  - 1.3.3 World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Region (2021-2032)
  - 1.3.4 North America Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032)
  - 1.3.5 Europe Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032)
  - 1.3.6 China Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032)
  - 1.3.7 Japan Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Polymer-Bound Photoacid Generator (PAG) Materials Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Polymer-Bound Photoacid Generator (PAG) Materials Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Polymer-Bound Photoacid Generator (PAG) Materials Demand (2021-2032)
- 2.2 World Polymer-Bound Photoacid Generator (PAG) Materials Consumption by Region
  - 2.2.1 World Polymer-Bound Photoacid Generator (PAG) Materials Consumption by

Region (2021-2026)

2.2.2 World Polymer-Bound Photoacid Generator (PAG) Materials Consumption

Forecast by Region (2027-2032)

2.3 United States Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.4 China Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.5 Europe Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.6 Japan Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.7 South Korea Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.8 ASEAN Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

2.9 India Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Manufacturer (2021-2026)

3.2 World Polymer-Bound Photoacid Generator (PAG) Materials Production by Manufacturer (2021-2026)

3.3 World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Manufacturer (2021-2026)

3.4 Polymer-Bound Photoacid Generator (PAG) Materials Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Polymer-Bound Photoacid Generator (PAG) Materials Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Polymer-Bound Photoacid Generator (PAG) Materials in 2025

3.5.3 Global Concentration Ratios (CR8) for Polymer-Bound Photoacid Generator (PAG) Materials in 2025

3.6 Polymer-Bound Photoacid Generator (PAG) Materials Market: Overall Company Footprint Analysis

3.6.1 Polymer-Bound Photoacid Generator (PAG) Materials Market: Region Footprint

3.6.2 Polymer-Bound Photoacid Generator (PAG) Materials Market: Company Product

## Type Footprint

### 3.6.3 Polymer-Bound Photoacid Generator (PAG) Materials 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: Polymer-Bound Photoacid Generator (PAG) Materials Production Value Comparison

#### 4.1.1 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Value Comparison (2021 & 2025 & 2032)

#### 4.1.2 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share Comparison (2021 & 2025 & 2032)

### 4.2 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Comparison

#### 4.2.1 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Comparison (2021 & 2025 & 2032)

#### 4.2.2 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share Comparison (2021 & 2025 & 2032)

### 4.3 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Consumption Comparison

#### 4.3.1 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Consumption Comparison (2021 & 2025 & 2032)

#### 4.3.2 United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Consumption Market Share Comparison (2021 & 2025 & 2032)

### 4.4 United States Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers and Market Share, 2021-2026

#### 4.4.1 United States Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers, Headquarters and Production Site (States, Country)

#### 4.4.2 United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value (2021-2026)

#### 4.4.3 United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2026)

### 4.5 China Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers

and Market Share

4.5.1 China Based Polymer-Bound Photoacid Generator (PAG) Materials  
Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Polymer-Bound Photoacid Generator (PAG)  
Materials Production Value (2021-2026)

4.5.3 China Based Manufacturers Polymer-Bound Photoacid Generator (PAG)  
Materials Production (2021-2026)

4.6 Rest of World Based Polymer-Bound Photoacid Generator (PAG) Materials  
Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Polymer-Bound Photoacid Generator (PAG) Materials  
Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG)  
Materials Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG)  
Materials Production (2021-2026)

## **5 MARKET ANALYSIS BY EXPOSURE WAVELENGTH**

5.1 World Polymer-Bound Photoacid Generator (PAG) Materials Market Size Overview  
by Exposure Wavelength: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Exposure Wavelength

5.2.1 Electronic Grade (Ultra-low Metal Impurities, ?10 ppb per metal, ?1 ppm total)

5.2.2 Industrial Grade (Metal Impurities typically 10–100 ppm)

5.2.3 Research Grade (Laboratory Grade, Non-standardized Impurity Control)

5.2.4 Others

5.3 Market Segment by Exposure Wavelength

5.3.1 World Polymer-Bound Photoacid Generator (PAG) Materials Production by  
Exposure Wavelength (2021-2032)

5.3.2 World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by  
Exposure Wavelength (2021-2032)

5.3.3 World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by  
Exposure Wavelength (2021-2032)

## **6 MARKET ANALYSIS BY APPLICATION**

6.1 World Polymer-Bound Photoacid Generator (PAG) Materials Market Size Overview  
by Application: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Application

6.2.1 Semiconductor Industry

6.2.2 Display Industry

6.2.3 Printing & Coatings

6.2.4 Additive Manufacturing

6.2.5 Others

6.3 Market Segment by Application

6.3.1 World Polymer-Bound Photoacid Generator (PAG) Materials Production by Application (2021-2032)

6.3.2 World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Application (2021-2032)

6.3.3 World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Application (2021-2032)

## **7 COMPANY PROFILES**

7.1 JSR Corporation

7.1.1 JSR Corporation Details

7.1.2 JSR Corporation Major Business

7.1.3 JSR Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.1.4 JSR Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.1.5 JSR Corporation Recent Developments/Updates

7.1.6 JSR Corporation Competitive Strengths & Weaknesses

7.2 Tokyo Ohka Kogyo

7.2.1 Tokyo Ohka Kogyo Details

7.2.2 Tokyo Ohka Kogyo Major Business

7.2.3 Tokyo Ohka Kogyo Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.2.4 Tokyo Ohka Kogyo Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.2.5 Tokyo Ohka Kogyo Recent Developments/Updates

7.2.6 Tokyo Ohka Kogyo Competitive Strengths & Weaknesses

7.3 Shin-Etsu Chemical

7.3.1 Shin-Etsu Chemical Details

7.3.2 Shin-Etsu Chemical Major Business

7.3.3 Shin-Etsu Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.3.4 Shin-Etsu Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 7.3.5 Shin-Etsu Chemical Recent Developments/Updates
- 7.3.6 Shin-Etsu Chemical Competitive Strengths & Weaknesses
- 7.4 Sumitomo Chemical
  - 7.4.1 Sumitomo Chemical Details
  - 7.4.2 Sumitomo Chemical Major Business
  - 7.4.3 Sumitomo Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.4.4 Sumitomo Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.4.5 Sumitomo Chemical Recent Developments/Updates
  - 7.4.6 Sumitomo Chemical Competitive Strengths & Weaknesses
- 7.5 Fujifilm Corporation
  - 7.5.1 Fujifilm Corporation Details
  - 7.5.2 Fujifilm Corporation Major Business
  - 7.5.3 Fujifilm Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.5.4 Fujifilm Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.5.5 Fujifilm Corporation Recent Developments/Updates
  - 7.5.6 Fujifilm Corporation Competitive Strengths & Weaknesses
- 7.6 Merck KGaA
  - 7.6.1 Merck KGaA Details
  - 7.6.2 Merck KGaA Major Business
  - 7.6.3 Merck KGaA Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.6.4 Merck KGaA Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.6.5 Merck KGaA Recent Developments/Updates
  - 7.6.6 Merck KGaA Competitive Strengths & Weaknesses
- 7.7 DuPont
  - 7.7.1 DuPont Details
  - 7.7.2 DuPont Major Business
  - 7.7.3 DuPont Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.7.4 DuPont Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.7.5 DuPont Recent Developments/Updates
  - 7.7.6 DuPont Competitive Strengths & Weaknesses
- 7.8 Dongjin Semichem

- 7.8.1 Dongjin Semichem Details
- 7.8.2 Dongjin Semichem Major Business
- 7.8.3 Dongjin Semichem Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.8.4 Dongjin Semichem Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.8.5 Dongjin Semichem Recent Developments/Updates
- 7.8.6 Dongjin Semichem Competitive Strengths & Weaknesses
- 7.9 Samyang NC Chem Co., Ltd.
- 7.9.1 Samyang NC Chem Co., Ltd. Details
- 7.9.2 Samyang NC Chem Co., Ltd. Major Business
- 7.9.3 Samyang NC Chem Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.9.4 Samyang NC Chem Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.9.5 Samyang NC Chem Co., Ltd. Recent Developments/Updates
- 7.9.6 Samyang NC Chem Co., Ltd. Competitive Strengths & Weaknesses
- 7.10 Heraeus Epurio
- 7.10.1 Heraeus Epurio Details
- 7.10.2 Heraeus Epurio Major Business
- 7.10.3 Heraeus Epurio Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.10.4 Heraeus Epurio Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.10.5 Heraeus Epurio Recent Developments/Updates
- 7.10.6 Heraeus Epurio Competitive Strengths & Weaknesses
- 7.11 Osaka Organic Chemical
- 7.11.1 Osaka Organic Chemical Details
- 7.11.2 Osaka Organic Chemical Major Business
- 7.11.3 Osaka Organic Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.11.4 Osaka Organic Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.11.5 Osaka Organic Chemical Recent Developments/Updates
- 7.11.6 Osaka Organic Chemical Competitive Strengths & Weaknesses
- 7.12 Central Glass
- 7.12.1 Central Glass Details
- 7.12.2 Central Glass Major Business
- 7.12.3 Central Glass Polymer-Bound Photoacid Generator (PAG) Materials Product

and Services

7.12.4 Central Glass Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.12.5 Central Glass Recent Developments/Updates

7.12.6 Central Glass Competitive Strengths & Weaknesses

7.13 ADEKA Corporation

7.13.1 ADEKA Corporation Details

7.13.2 ADEKA Corporation Major Business

7.13.3 ADEKA Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.13.4 ADEKA Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.13.5 ADEKA Corporation Recent Developments/Updates

7.13.6 ADEKA Corporation Competitive Strengths & Weaknesses

7.14 DIC Corporation

7.14.1 DIC Corporation Details

7.14.2 DIC Corporation Major Business

7.14.3 DIC Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.14.4 DIC Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.14.5 DIC Corporation Recent Developments/Updates

7.14.6 DIC Corporation Competitive Strengths & Weaknesses

7.15 Toray Industries

7.15.1 Toray Industries Details

7.15.2 Toray Industries Major Business

7.15.3 Toray Industries Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.15.4 Toray Industries Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.15.5 Toray Industries Recent Developments/Updates

7.15.6 Toray Industries Competitive Strengths & Weaknesses

7.16 Mitsubishi Chemical Group

7.16.1 Mitsubishi Chemical Group Details

7.16.2 Mitsubishi Chemical Group Major Business

7.16.3 Mitsubishi Chemical Group Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.16.4 Mitsubishi Chemical Group Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 7.16.5 Mitsubishi Chemical Group Recent Developments/Updates
- 7.16.6 Mitsubishi Chemical Group Competitive Strengths & Weaknesses
- 7.17 Sumitomo Bakelite
  - 7.17.1 Sumitomo Bakelite Details
  - 7.17.2 Sumitomo Bakelite Major Business
  - 7.17.3 Sumitomo Bakelite Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.17.4 Sumitomo Bakelite Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.17.5 Sumitomo Bakelite Recent Developments/Updates
  - 7.17.6 Sumitomo Bakelite Competitive Strengths & Weaknesses
- 7.18 Kanto Chemical
  - 7.18.1 Kanto Chemical Details
  - 7.18.2 Kanto Chemical Major Business
  - 7.18.3 Kanto Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.18.4 Kanto Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.18.5 Kanto Chemical Recent Developments/Updates
  - 7.18.6 Kanto Chemical Competitive Strengths & Weaknesses
- 7.19 Tokyo Chemical Industry
  - 7.19.1 Tokyo Chemical Industry Details
  - 7.19.2 Tokyo Chemical Industry Major Business
  - 7.19.3 Tokyo Chemical Industry Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.19.4 Tokyo Chemical Industry Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.19.5 Tokyo Chemical Industry Recent Developments/Updates
  - 7.19.6 Tokyo Chemical Industry Competitive Strengths & Weaknesses
- 7.20 Kayaku Advanced Materials
  - 7.20.1 Kayaku Advanced Materials Details
  - 7.20.2 Kayaku Advanced Materials Major Business
  - 7.20.3 Kayaku Advanced Materials Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.20.4 Kayaku Advanced Materials Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.20.5 Kayaku Advanced Materials Recent Developments/Updates
  - 7.20.6 Kayaku Advanced Materials Competitive Strengths & Weaknesses
- 7.21 Brewer Science

- 7.21.1 Brewer Science Details
- 7.21.2 Brewer Science Major Business
- 7.21.3 Brewer Science Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.21.4 Brewer Science Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.21.5 Brewer Science Recent Developments/Updates
- 7.21.6 Brewer Science Competitive Strengths & Weaknesses
- 7.22 Allresist GmbH
  - 7.22.1 Allresist GmbH Details
  - 7.22.2 Allresist GmbH Major Business
  - 7.22.3 Allresist GmbH Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.22.4 Allresist GmbH Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.22.5 Allresist GmbH Recent Developments/Updates
  - 7.22.6 Allresist GmbH Competitive Strengths & Weaknesses
- 7.23 LG Chem
  - 7.23.1 LG Chem Details
  - 7.23.2 LG Chem Major Business
  - 7.23.3 LG Chem Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.23.4 LG Chem Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.23.5 LG Chem Recent Developments/Updates
  - 7.23.6 LG Chem Competitive Strengths & Weaknesses
- 7.24 Chemax Co., Ltd.
  - 7.24.1 Chemax Co., Ltd. Details
  - 7.24.2 Chemax Co., Ltd. Major Business
  - 7.24.3 Chemax Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.24.4 Chemax Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.24.5 Chemax Co., Ltd. Recent Developments/Updates
  - 7.24.6 Chemax Co., Ltd. Competitive Strengths & Weaknesses
- 7.25 ENF Technology Co., Ltd.
  - 7.25.1 ENF Technology Co., Ltd. Details
  - 7.25.2 ENF Technology Co., Ltd. Major Business
  - 7.25.3 ENF Technology Co., Ltd. Polymer-Bound Photoacid Generator (PAG)

## Materials Product and Services

7.25.4 ENF Technology Co., Ltd. Polymer-Bound Photoacid Generator (PAG)

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

7.25.5 ENF Technology Co., Ltd. Recent Developments/Updates

7.25.6 ENF Technology Co., Ltd. Competitive Strengths & Weaknesses

## 7.26 DNF Co., Ltd.

7.26.1 DNF Co., Ltd. Details

7.26.2 DNF Co., Ltd. Major Business

7.26.3 DNF Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.26.4 DNF Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.26.5 DNF Co., Ltd. Recent Developments/Updates

7.26.6 DNF Co., Ltd. Competitive Strengths & Weaknesses

## 7.27 Miwon Commercial Co., Ltd.

7.27.1 Miwon Commercial Co., Ltd. Details

7.27.2 Miwon Commercial Co., Ltd. Major Business

7.27.3 Miwon Commercial Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.27.4 Miwon Commercial Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.27.5 Miwon Commercial Co., Ltd. Recent Developments/Updates

7.27.6 Miwon Commercial Co., Ltd. Competitive Strengths & Weaknesses

## 7.28 Hubei Dinglong Co., Ltd.

7.28.1 Hubei Dinglong Co., Ltd. Details

7.28.2 Hubei Dinglong Co., Ltd. Major Business

7.28.3 Hubei Dinglong Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.28.4 Hubei Dinglong Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.28.5 Hubei Dinglong Co., Ltd. Recent Developments/Updates

7.28.6 Hubei Dinglong Co., Ltd. Competitive Strengths & Weaknesses

## 7.29 Suzhou Ruihong Electronic Chemicals Co., Ltd.

7.29.1 Suzhou Ruihong Electronic Chemicals Co., Ltd. Details

7.29.2 Suzhou Ruihong Electronic Chemicals Co., Ltd. Major Business

7.29.3 Suzhou Ruihong Electronic Chemicals Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.29.4 Suzhou Ruihong Electronic Chemicals Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share

(2021-2026)

7.29.5 Suzhou Ruihong Electronic Chemicals Co., Ltd. Recent Developments/Updates

7.29.6 Suzhou Ruihong Electronic Chemicals Co., Ltd. Competitive Strengths & Weaknesses

7.30 Beijing Kehua Microelectronics Materials Co., Ltd.

7.30.1 Beijing Kehua Microelectronics Materials Co., Ltd. Details

7.30.2 Beijing Kehua Microelectronics Materials Co., Ltd. Major Business

7.30.3 Beijing Kehua Microelectronics Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.30.4 Beijing Kehua Microelectronics Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.30.5 Beijing Kehua Microelectronics Materials Co., Ltd. Recent Developments/Updates

7.30.6 Beijing Kehua Microelectronics Materials Co., Ltd. Competitive Strengths & Weaknesses

7.31 Shanghai Sinyang Semiconductor Materials Co., Ltd.

7.31.1 Shanghai Sinyang Semiconductor Materials Co., Ltd. Details

7.31.2 Shanghai Sinyang Semiconductor Materials Co., Ltd. Major Business

7.31.3 Shanghai Sinyang Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.31.4 Shanghai Sinyang Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.31.5 Shanghai Sinyang Semiconductor Materials Co., Ltd. Recent Developments/Updates

7.31.6 Shanghai Sinyang Semiconductor Materials Co., Ltd. Competitive Strengths & Weaknesses

7.32 Crystal Clear Electronic Material Co., Ltd.

7.32.1 Crystal Clear Electronic Material Co., Ltd. Details

7.32.2 Crystal Clear Electronic Material Co., Ltd. Major Business

7.32.3 Crystal Clear Electronic Material Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

7.32.4 Crystal Clear Electronic Material Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

7.32.5 Crystal Clear Electronic Material Co., Ltd. Recent Developments/Updates

7.32.6 Crystal Clear Electronic Material Co., Ltd. Competitive Strengths & Weaknesses

7.33 Suzhou Weimas Semiconductor Materials Co., Ltd.

- 7.33.1 Suzhou Weimas Semiconductor Materials Co., Ltd. Details
- 7.33.2 Suzhou Weimas Semiconductor Materials Co., Ltd. Major Business
- 7.33.3 Suzhou Weimas Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- 7.33.4 Suzhou Weimas Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 7.33.5 Suzhou Weimas Semiconductor Materials Co., Ltd. Recent Developments/Updates
- 7.33.6 Suzhou Weimas Semiconductor Materials Co., Ltd. Competitive Strengths & Weaknesses
- 7.34 Xuzhou B & C Chemical Co., Ltd.
  - 7.34.1 Xuzhou B & C Chemical Co., Ltd. Details
  - 7.34.2 Xuzhou B & C Chemical Co., Ltd. Major Business
  - 7.34.3 Xuzhou B & C Chemical Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
  - 7.34.4 Xuzhou B & C Chemical Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 7.34.5 Xuzhou B & C Chemical Co., Ltd. Recent Developments/Updates
  - 7.34.6 Xuzhou B & C Chemical Co., Ltd. Competitive Strengths & Weaknesses

## **8 INDUSTRY CHAIN ANALYSIS**

- 8.1 Polymer-Bound Photoacid Generator (PAG) Materials Industry Chain
- 8.2 Polymer-Bound Photoacid Generator (PAG) Materials Upstream Analysis
  - 8.2.1 Polymer-Bound Photoacid Generator (PAG) Materials Core Raw Materials
  - 8.2.2 Main Manufacturers of Polymer-Bound Photoacid Generator (PAG) Materials Core Raw Materials
- 8.3 Midstream Analysis
- 8.4 Downstream Analysis
- 8.5 Polymer-Bound Photoacid Generator (PAG) Materials Production Mode
- 8.6 Polymer-Bound Photoacid Generator (PAG) Materials Procurement Model
- 8.7 Polymer-Bound Photoacid Generator (PAG) Materials Industry Sales Model and Sales Channels
  - 8.7.1 Polymer-Bound Photoacid Generator (PAG) Materials Sales Model
  - 8.7.2 Polymer-Bound Photoacid Generator (PAG) Materials Typical Distributors

## **9 RESEARCH FINDINGS AND CONCLUSION**

## **10 APPENDIX**

10.1 Methodology

10.2 Research Process and Data Source

10.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Region (2021-2026)
- Table 5. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Region (2027-2032)
- Table 6. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Region (2021-2026) & (kg)
- Table 7. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Region (2027-2032) & (kg)
- Table 8. World Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share by Region (2021-2026)
- Table 9. World Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share by Region (2027-2032)
- Table 10. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Region (2021-2026) & (US\$/kg)
- Table 11. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Region (2027-2032) & (US\$/kg)
- Table 12. Polymer-Bound Photoacid Generator (PAG) Materials Major Market Trends
- Table 13. World Polymer-Bound Photoacid Generator (PAG) Materials Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (kg)
- Table 14. World Polymer-Bound Photoacid Generator (PAG) Materials Consumption by Region (2021-2026) & (kg)
- Table 15. World Polymer-Bound Photoacid Generator (PAG) Materials Consumption Forecast by Region (2027-2032) & (kg)
- Table 16. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Polymer-Bound Photoacid Generator (PAG) Materials Producers in 2025
- Table 18. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Manufacturer (2021-2026) & (kg)

- Table 19. Production Market Share of Key Polymer-Bound Photoacid Generator (PAG) Materials Producers in 2025
- Table 20. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Manufacturer (2021-2026) & (US\$/kg)
- Table 21. Global Polymer-Bound Photoacid Generator (PAG) Materials Company Evaluation Quadrant
- Table 22. World Polymer-Bound Photoacid Generator (PAG) Materials Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Polymer-Bound Photoacid Generator (PAG) Materials Production Site of Key Manufacturer
- Table 24. Polymer-Bound Photoacid Generator (PAG) Materials Market: Company Product Type Footprint
- Table 25. Polymer-Bound Photoacid Generator (PAG) Materials Market: Company Product Application Footprint
- Table 26. Polymer-Bound Photoacid Generator (PAG) Materials Competitive Factors
- Table 27. Polymer-Bound Photoacid Generator (PAG) Materials New Entrant and Capacity Expansion Plans
- Table 28. Polymer-Bound Photoacid Generator (PAG) Materials Mergers & Acquisitions Activity
- Table 29. United States VS China Polymer-Bound Photoacid Generator (PAG) Materials Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 30. United States VS China Polymer-Bound Photoacid Generator (PAG) Materials Production Comparison, (2021 & 2025 & 2032) & (kg)
- Table 31. United States VS China Polymer-Bound Photoacid Generator (PAG) Materials Consumption Comparison, (2021 & 2025 & 2032) & (kg)
- Table 32. United States Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers, Headquarters and Production Site (States, Country)
- Table 33. United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value, (2021-2026) & (USD Million)
- Table 34. United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share (2021-2026)
- Table 35. United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2026) & (kg)
- Table 36. United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share (2021-2026)
- Table 37. China Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers, Headquarters and Production Site (Province, Country)
- Table 38. China Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production, (2021-2026) & (kg)

Table 41. China Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share (2021-2026)

Table 42. Rest of World Based Polymer-Bound Photoacid Generator (PAG) Materials Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production, (2021-2026) & (kg)

Table 46. Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share (2021-2026)

Table 47. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Exposure Wavelength, (USD Million), 2021 & 2025 & 2032

Table 48. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Exposure Wavelength (2021-2026) & (kg)

Table 49. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Exposure Wavelength (2027-2032) & (kg)

Table 50. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Exposure Wavelength (2021-2026) & (USD Million)

Table 51. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Exposure Wavelength (2027-2032) & (USD Million)

Table 52. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Exposure Wavelength (2021-2026) & (US\$/kg)

Table 53. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Exposure Wavelength (2027-2032) & (US\$/kg)

Table 54. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 55. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Application (2021-2026) & (kg)

Table 56. World Polymer-Bound Photoacid Generator (PAG) Materials Production by Application (2027-2032) & (kg)

Table 57. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Application (2021-2026) & (USD Million)

Table 58. World Polymer-Bound Photoacid Generator (PAG) Materials Production

Value by Application (2027-2032) & (USD Million)

Table 59. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Application (2021-2026) & (US\$/kg)

Table 60. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Application (2027-2032) & (US\$/kg)

Table 61. JSR Corporation Basic Information, Manufacturing Base and Competitors

Table 62. JSR Corporation Major Business

Table 63. JSR Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 64. JSR Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. JSR Corporation Recent Developments/Updates

Table 66. JSR Corporation Competitive Strengths & Weaknesses

Table 67. Tokyo Ohka Kogyo Basic Information, Manufacturing Base and Competitors

Table 68. Tokyo Ohka Kogyo Major Business

Table 69. Tokyo Ohka Kogyo Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 70. Tokyo Ohka Kogyo Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 71. Tokyo Ohka Kogyo Recent Developments/Updates

Table 72. Tokyo Ohka Kogyo Competitive Strengths & Weaknesses

Table 73. Shin-Etsu Chemical Basic Information, Manufacturing Base and Competitors

Table 74. Shin-Etsu Chemical Major Business

Table 75. Shin-Etsu Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 76. Shin-Etsu Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 77. Shin-Etsu Chemical Recent Developments/Updates

Table 78. Shin-Etsu Chemical Competitive Strengths & Weaknesses

Table 79. Sumitomo Chemical Basic Information, Manufacturing Base and Competitors

Table 80. Sumitomo Chemical Major Business

Table 81. Sumitomo Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 82. Sumitomo Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 83. Sumitomo Chemical Recent Developments/Updates
- Table 84. Sumitomo Chemical Competitive Strengths & Weaknesses
- Table 85. Fujifilm Corporation Basic Information, Manufacturing Base and Competitors
- Table 86. Fujifilm Corporation Major Business
- Table 87. Fujifilm Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 88. Fujifilm Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 89. Fujifilm Corporation Recent Developments/Updates
- Table 90. Fujifilm Corporation Competitive Strengths & Weaknesses
- Table 91. Merck KGaA Basic Information, Manufacturing Base and Competitors
- Table 92. Merck KGaA Major Business
- Table 93. Merck KGaA Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 94. Merck KGaA Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 95. Merck KGaA Recent Developments/Updates
- Table 96. Merck KGaA Competitive Strengths & Weaknesses
- Table 97. DuPont Basic Information, Manufacturing Base and Competitors
- Table 98. DuPont Major Business
- Table 99. DuPont Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 100. DuPont Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 101. DuPont Recent Developments/Updates
- Table 102. DuPont Competitive Strengths & Weaknesses
- Table 103. Dongjin Semichem Basic Information, Manufacturing Base and Competitors
- Table 104. Dongjin Semichem Major Business
- Table 105. Dongjin Semichem Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 106. Dongjin Semichem Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 107. Dongjin Semichem Recent Developments/Updates
- Table 108. Dongjin Semichem Competitive Strengths & Weaknesses
- Table 109. Samyang NC Chem Co., Ltd. Basic Information, Manufacturing Base and

## Competitors

Table 110. Samyang NC Chem Co., Ltd. Major Business

Table 111. Samyang NC Chem Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 112. Samyang NC Chem Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 113. Samyang NC Chem Co., Ltd. Recent Developments/Updates

Table 114. Samyang NC Chem Co., Ltd. Competitive Strengths & Weaknesses

Table 115. Heraeus Epurio Basic Information, Manufacturing Base and Competitors

Table 116. Heraeus Epurio Major Business

Table 117. Heraeus Epurio Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 118. Heraeus Epurio Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 119. Heraeus Epurio Recent Developments/Updates

Table 120. Heraeus Epurio Competitive Strengths & Weaknesses

Table 121. Osaka Organic Chemical Basic Information, Manufacturing Base and Competitors

Table 122. Osaka Organic Chemical Major Business

Table 123. Osaka Organic Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 124. Osaka Organic Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 125. Osaka Organic Chemical Recent Developments/Updates

Table 126. Osaka Organic Chemical Competitive Strengths & Weaknesses

Table 127. Central Glass Basic Information, Manufacturing Base and Competitors

Table 128. Central Glass Major Business

Table 129. Central Glass Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 130. Central Glass Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 131. Central Glass Recent Developments/Updates

Table 132. Central Glass Competitive Strengths & Weaknesses

Table 133. ADEKA Corporation Basic Information, Manufacturing Base and Competitors

Table 134. ADEKA Corporation Major Business

Table 135. ADEKA Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 136. ADEKA Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 137. ADEKA Corporation Recent Developments/Updates

Table 138. ADEKA Corporation Competitive Strengths & Weaknesses

Table 139. DIC Corporation Basic Information, Manufacturing Base and Competitors

Table 140. DIC Corporation Major Business

Table 141. DIC Corporation Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 142. DIC Corporation Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 143. DIC Corporation Recent Developments/Updates

Table 144. DIC Corporation Competitive Strengths & Weaknesses

Table 145. Toray Industries Basic Information, Manufacturing Base and Competitors

Table 146. Toray Industries Major Business

Table 147. Toray Industries Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 148. Toray Industries Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 149. Toray Industries Recent Developments/Updates

Table 150. Toray Industries Competitive Strengths & Weaknesses

Table 151. Mitsubishi Chemical Group Basic Information, Manufacturing Base and Competitors

Table 152. Mitsubishi Chemical Group Major Business

Table 153. Mitsubishi Chemical Group Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 154. Mitsubishi Chemical Group Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 155. Mitsubishi Chemical Group Recent Developments/Updates

Table 156. Mitsubishi Chemical Group Competitive Strengths & Weaknesses

Table 157. Sumitomo Bakelite Basic Information, Manufacturing Base and Competitors

Table 158. Sumitomo Bakelite Major Business

Table 159. Sumitomo Bakelite Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 160. Sumitomo Bakelite Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 161. Sumitomo Bakelite Recent Developments/Updates

Table 162. Sumitomo Bakelite Competitive Strengths & Weaknesses

Table 163. Kanto Chemical Basic Information, Manufacturing Base and Competitors

Table 164. Kanto Chemical Major Business

Table 165. Kanto Chemical Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 166. Kanto Chemical Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 167. Kanto Chemical Recent Developments/Updates

Table 168. Kanto Chemical Competitive Strengths & Weaknesses

Table 169. Tokyo Chemical Industry Basic Information, Manufacturing Base and Competitors

Table 170. Tokyo Chemical Industry Major Business

Table 171. Tokyo Chemical Industry Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 172. Tokyo Chemical Industry Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 173. Tokyo Chemical Industry Recent Developments/Updates

Table 174. Tokyo Chemical Industry Competitive Strengths & Weaknesses

Table 175. Kayaku Advanced Materials Basic Information, Manufacturing Base and Competitors

Table 176. Kayaku Advanced Materials Major Business

Table 177. Kayaku Advanced Materials Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 178. Kayaku Advanced Materials Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 179. Kayaku Advanced Materials Recent Developments/Updates

Table 180. Kayaku Advanced Materials Competitive Strengths & Weaknesses

Table 181. Brewer Science Basic Information, Manufacturing Base and Competitors

Table 182. Brewer Science Major Business

Table 183. Brewer Science Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 184. Brewer Science Polymer-Bound Photoacid Generator (PAG) Materials

Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 185. Brewer Science Recent Developments/Updates

Table 186. Brewer Science Competitive Strengths & Weaknesses

Table 187. Allresist GmbH Basic Information, Manufacturing Base and Competitors

Table 188. Allresist GmbH Major Business

Table 189. Allresist GmbH Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 190. Allresist GmbH Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 191. Allresist GmbH Recent Developments/Updates

Table 192. Allresist GmbH Competitive Strengths & Weaknesses

Table 193. LG Chem Basic Information, Manufacturing Base and Competitors

Table 194. LG Chem Major Business

Table 195. LG Chem Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 196. LG Chem Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 197. LG Chem Recent Developments/Updates

Table 198. LG Chem Competitive Strengths & Weaknesses

Table 199. Chemax Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 200. Chemax Co., Ltd. Major Business

Table 201. Chemax Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 202. Chemax Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 203. Chemax Co., Ltd. Recent Developments/Updates

Table 204. Chemax Co., Ltd. Competitive Strengths & Weaknesses

Table 205. ENF Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 206. ENF Technology Co., Ltd. Major Business

Table 207. ENF Technology Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 208. ENF Technology Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

- Table 209. ENF Technology Co., Ltd. Recent Developments/Updates
- Table 210. ENF Technology Co., Ltd. Competitive Strengths & Weaknesses
- Table 211. DNF Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 212. DNF Co., Ltd. Major Business
- Table 213. DNF Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 214. DNF Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 215. DNF Co., Ltd. Recent Developments/Updates
- Table 216. DNF Co., Ltd. Competitive Strengths & Weaknesses
- Table 217. Miwon Commercial Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 218. Miwon Commercial Co., Ltd. Major Business
- Table 219. Miwon Commercial Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 220. Miwon Commercial Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 221. Miwon Commercial Co., Ltd. Recent Developments/Updates
- Table 222. Miwon Commercial Co., Ltd. Competitive Strengths & Weaknesses
- Table 223. Hubei Dinglong Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 224. Hubei Dinglong Co., Ltd. Major Business
- Table 225. Hubei Dinglong Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 226. Hubei Dinglong Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 227. Hubei Dinglong Co., Ltd. Recent Developments/Updates
- Table 228. Hubei Dinglong Co., Ltd. Competitive Strengths & Weaknesses
- Table 229. Suzhou Ruihong Electronic Chemicals Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 230. Suzhou Ruihong Electronic Chemicals Co., Ltd. Major Business
- Table 231. Suzhou Ruihong Electronic Chemicals Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services
- Table 232. Suzhou Ruihong Electronic Chemicals Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 233. Suzhou Ruihong Electronic Chemicals Co., Ltd. Recent Developments/Updates

Table 234. Suzhou Ruihong Electronic Chemicals Co., Ltd. Competitive Strengths & Weaknesses

Table 235. Beijing Kehua Microelectronics Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 236. Beijing Kehua Microelectronics Materials Co., Ltd. Major Business

Table 237. Beijing Kehua Microelectronics Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 238. Beijing Kehua Microelectronics Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 239. Beijing Kehua Microelectronics Materials Co., Ltd. Recent Developments/Updates

Table 240. Beijing Kehua Microelectronics Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 241. Shanghai Sinyang Semiconductor Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 242. Shanghai Sinyang Semiconductor Materials Co., Ltd. Major Business

Table 243. Shanghai Sinyang Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 244. Shanghai Sinyang Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 245. Shanghai Sinyang Semiconductor Materials Co., Ltd. Recent Developments/Updates

Table 246. Shanghai Sinyang Semiconductor Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 247. Crystal Clear Electronic Material Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 248. Crystal Clear Electronic Material Co., Ltd. Major Business

Table 249. Crystal Clear Electronic Material Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 250. Crystal Clear Electronic Material Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 251. Crystal Clear Electronic Material Co., Ltd. Recent Developments/Updates

Table 252. Crystal Clear Electronic Material Co., Ltd. Competitive Strengths & Weaknesses

Table 253. Suzhou Weimas Semiconductor Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 254. Suzhou Weimas Semiconductor Materials Co., Ltd. Major Business

Table 255. Suzhou Weimas Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 256. Suzhou Weimas Semiconductor Materials Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 257. Suzhou Weimas Semiconductor Materials Co., Ltd. Recent Developments/Updates

Table 258. Suzhou Weimas Semiconductor Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 259. Xuzhou B & C Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 260. Xuzhou B & C Chemical Co., Ltd. Major Business

Table 261. Xuzhou B & C Chemical Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Product and Services

Table 262. Xuzhou B & C Chemical Co., Ltd. Polymer-Bound Photoacid Generator (PAG) Materials Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 263. Xuzhou B & C Chemical Co., Ltd. Recent Developments/Updates

Table 264. Xuzhou B & C Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 265. Global Key Players of Polymer-Bound Photoacid Generator (PAG) Materials Upstream (Raw Materials)

Table 266. Global Polymer-Bound Photoacid Generator (PAG) Materials Typical Customers

Table 267. Polymer-Bound Photoacid Generator (PAG) Materials Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Polymer-Bound Photoacid Generator (PAG) Materials Picture

Figure 2. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032) & (kg)

Figure 5. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price (2021-2032) & (US\$/kg)

Figure 6. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Region (2021-2032)

Figure 7. World Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share by Region (2021-2032)

Figure 8. North America Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032) & (kg)

Figure 9. Europe Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032) & (kg)

Figure 10. China Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032) & (kg)

Figure 11. Japan Polymer-Bound Photoacid Generator (PAG) Materials Production (2021-2032) & (kg)

Figure 12. Polymer-Bound Photoacid Generator (PAG) Materials Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 15. World Polymer-Bound Photoacid Generator (PAG) Materials Consumption Market Share by Region (2021-2032)

Figure 16. United States Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 17. China Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 18. Europe Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 19. Japan Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 20. South Korea Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 21. ASEAN Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 22. India Polymer-Bound Photoacid Generator (PAG) Materials Consumption (2021-2032) & (kg)

Figure 23. Producer Shipments of Polymer-Bound Photoacid Generator (PAG) Materials by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Polymer-Bound Photoacid Generator (PAG) Materials Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Polymer-Bound Photoacid Generator (PAG) Materials Markets in 2025

Figure 26. United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Polymer-Bound Photoacid Generator (PAG) Materials Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share 2025

Figure 30. China Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share 2025

Figure 32. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Exposure Wavelength, (USD Million), 2021 & 2025 & 2032

Figure 33. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Exposure Wavelength in 2025

Figure 34. Electronic Grade (Ultra-low Metal Impurities, ?10 ppb per metal, ?1 ppm total)

Figure 35. Industrial Grade (Metal Impurities typically 10–100 ppm)

Figure 36. Research Grade (Laboratory Grade, Non-standardized Impurity Control)

Figure 37. Others

Figure 38. World Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share by Exposure Wavelength (2021-2032)

Figure 39. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Exposure Wavelength (2021-2032)

Figure 40. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Exposure Wavelength (2021-2032) & (US\$/kg)

- Figure 41. Backbone-bound PAG Polymer
- Figure 42. Side-chain-bound PAG Polymer
- Figure 43. Hybrid Functional Polymer
- Figure 44. EUV (13.5 nm)
- Figure 45. ArF (193 nm)
- Figure 46. KrF (248 nm)
- Figure 47. Others
- Figure 48. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 49. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Application in 2025
- Figure 50. Semiconductor Industry
- Figure 51. Display Industry
- Figure 52. Printing & Coatings
- Figure 53. Additive Manufacturing
- Figure 54. Others
- Figure 55. World Polymer-Bound Photoacid Generator (PAG) Materials Production Market Share by Application (2021-2032)
- Figure 56. World Polymer-Bound Photoacid Generator (PAG) Materials Production Value Market Share by Application (2021-2032)
- Figure 57. World Polymer-Bound Photoacid Generator (PAG) Materials Average Price by Application (2021-2032) & (US\$/kg)
- Figure 58. Polymer-Bound Photoacid Generator (PAG) Materials Industry Chain
- Figure 59. Polymer-Bound Photoacid Generator (PAG) Materials Procurement Model
- Figure 60. Polymer-Bound Photoacid Generator (PAG) Materials Sales Model
- Figure 61. Polymer-Bound Photoacid Generator (PAG) Materials Sales Channels, Direct Sales, and Distribution
- Figure 62. Methodology
- Figure 63. Research Process and Data Source

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