

Global Positive TFT Photoresist 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 Positive TFT Photoresist market size was valued at US\$ 1561 million in 2025 and is forecast to a readjusted size of US\$ 2445 million by 2032 with a CAGR of 6.9% during review period.

TFT positive photoresist is a type of positive photosensitive material used in the manufacturing of thin-film transistor (TFT) arrays. It is primarily composed of film-forming resins, photosensitizers, solvents, additives, and filtration/purification systems. After being coated onto glass substrates or display panel substrates, it undergoes exposure, development, and etching processes to form patterns used in manufacturing steps such as gate electrodes, source/drain electrodes, pixel electrodes, insulating layer openings, and metal wiring. In 2025, global sales volume for TFT positive photoresist is approximately 82,000 metric tons, with an average unit price of about \$18,500 per ton and a global capacity utilization rate of approximately 73.5%. Upstream industry players include manufacturers of photoresist resins, photosensitizers, electronic-grade solvents, additives, filtration materials, ultra-clean packaging, precision mixing equipment, and electronic chemical testing services. Downstream players include manufacturers of LCD panels, OLED panels, Mini LED backplanes, display driver components, touch-display modules, and supporting panel process materials; the industry's average gross profit margin is approximately 35.8%. The cost structure is broken down as follows: resins (approx. 24%), photosensitizers (16%), electronic-grade solvents (21%), additives and stabilizers (6%), filtration/purification and ultra-clean packaging (8%), R&D/validation and customer adoption (7%), labor and factory management (5%), equipment depreciation and cleanroom operations (5%), testing and quality control (4%), and warehousing/logistics and after-sales technical services (4%). Demand drivers include TFT array manufacturing, LCD panel capacity expansion and upgrades, OLED

backplane manufacturing, large-format substrates for high-generation production lines, automotive displays, laptop and tablet panels, integrated touch-display solutions, Mini LED backplanes, and the localization of panel materials. Downstream customers include BOE, TCL CSOT, HKC, Tianma Microelectronics, Visionox, LG Display, and Samsung. ...display manufacturers such as AUO, Innolux, and Sharp, as well as various panel material validation platforms. Regarding business opportunities, policy drivers stem from the need for autonomy and control within the emerging display industry chain, the domestic substitution of electronic chemicals, the development of advanced display manufacturing capabilities, and the security of critical material supplies. Technological innovation is driven by factors such as low-defect formulations, high-resolution imaging, highly sensitive photosensitive systems, low metal-ion control, high-purity solvent purification, in-line filtration, coating compatibility with high-generation production lines, and the optimization of process windows tailored to customer specifications. Finally, shifting consumer demands are reflected in the evolving requirements of downstream panel customers, who are moving beyond a sole focus on price toward a comprehensive set of needs: higher yields, lower residue levels, superior batch-to-batch consistency, fewer display defects, faster validation and adoption, and more secure local supply.

TFT positive photoresist is a critical electronic chemical used in display panel manufacturing; it is characterized by stable consumption volumes, lengthy customer validation cycles, and high value regarding domestic substitution. Demand is primarily driven by capacity utilization across high-generation LCD lines, OLED backplanes, automotive displays, IT displays, and emerging display technologies. Compared to photoresists used in advanced semiconductor processes, TFT positive photoresists have relatively lower requirements for ultimate resolution but demand high performance in large-area coating uniformity, defect control, residue management, metal ion impurity levels, pattern stability, storage stability, and compatibility with panel manufacturers' process windows; consequently, entering the supply chains of mainstream panel manufacturers still requires a lengthy certification process. Over the next two to five years, industry growth will not rely solely on the rapid expansion of total panel surface area but will increasingly stem from upgrades to high-end display architectures, the rising market share of OLED and automotive displays, increased localization of materials by domestic panel manufacturers, and a heightened customer focus on supply chain security. Regarding the competitive landscape, companies from Japan, South Korea, and Taiwan possess strong foundations in formulation expertise and customer certifications, whereas enterprises in mainland China have significant growth potential in areas such as local service, cost control, rapid response, and domestic substitution. As the panel industry shifts from capacity expansion toward profitability recovery and high-

end upgrades, competition among photoresist suppliers will pivot from low-price strategies to capabilities in ensuring stable yields, controlling defect rates, providing rapid technical support, and offering customized formulations; companies capable of controlling high-purity raw materials, maintaining clean production environments, ensuring batch consistency, and collaborating with panel manufacturers on validation will be better positioned to increase their market share.

This report is a detailed and comprehensive analysis for global Positive TFT Photoresist market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Positive TFT Photoresist market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

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

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

Global Positive TFT Photoresist market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Positive TFT Photoresist

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 Positive TFT Photoresist 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 Merck KGaA (DE), DONGJIN SEMICHEM Co., Ltd. (KR), Sumitomo Chemical Co., Ltd. (JP), Tokyo Ohka Kogyo Co., Ltd. (TOK) (JP), Mitsubishi Chemical Corporation (JP), Toray Industries, Inc. (JP), JSR Corporation (JP), Beijing Kempur Microelectronics, Inc. (CN), Beijing Beixu Electronic Materials Co., Ltd. (CN), Caihong Group (CN), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Positive TFT Photoresist market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

i-Line Positive TFT Photoresist

g-Line Positive TFT Photoresist

Other

Market segment by Coating Process

Spin

Slit

Market segment by Minimum Line Width

?1.5?m

1.5-2?m

2-4?m

4-6?m

6-8?m

?8?m

Market segment by Application

AMOLED

LCD

Semiconductor Manufacturing

Other

Major players covered

Merck KGaA (DE)

DONGJIN SEMICHEM Co., Ltd. (KR)

Sumitomo Chemical Co., Ltd. (JP)

Tokyo Ohka Kogyo Co., Ltd. (TOK) (JP)

Mitsubishi Chemical Corporation (JP)

Toray Industries, Inc. (JP)

JSR Corporation (JP)

Beijing Kempur Microelectronics, Inc. (CN)

Beijing Beixu Electronic Materials Co., Ltd. (CN)

Caihong Group (CN)

Ruihong (Suzhou) Electronic Chemicals Co., Ltd. (CN)

Shenzhen RongDa Photosensitive Science & Technology Co., Ltd. (CN)

Shanghai PhiChem Materials Co., Ltd. (CN)

Jiangsu Aisen Semiconductor Materials Co., Ltd. (CN)

Everlight Chemical Industrial Corporation (TW)

Beijing Eternal Material Technology Co., Ltd. (CN)

Advanced Echem Materials Company Limited (AEMC) (TW)

Jiangsu Yoke Technology Co., Ltd. (CN)

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 Positive TFT Photoresist product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Positive TFT Photoresist breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Positive TFT Photoresist market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Positive TFT Photoresist.

Chapter 14 and 15, to describe Positive TFT Photoresist sales channel, distributors, customers, research findings and conclusion.

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1.5.2 $\geq 1.5\mu\text{m}$

1.5.3 1.5-2 μm

1.5.4 2-4 μm

1.5.5 4-6 μm

1.5.6 6-8 μm

1.5.7 $\geq 8\mu\text{m}$

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