

Global Positive TFT Photoresist Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Positive TFT Photoresist market size is expected to reach \$ 2445 million by 2032, rising at a market growth of 6.9% CAGR during the forecast period (2026-2032).

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 studies the global Positive TFT Photoresist production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Positive TFT Photoresist 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 Positive TFT Photoresist that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Positive TFT Photoresist total production and demand, 2021-2032, (Tons)

Global Positive TFT Photoresist total production value, 2021-2032, (USD Million)

Global Positive TFT Photoresist production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Positive TFT Photoresist consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Positive TFT Photoresist domestic production, consumption, key domestic manufacturers and share

Global Positive TFT Photoresist production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Positive TFT Photoresist production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Positive TFT Photoresist production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Positive TFT Photoresist 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Positive TFT Photoresist market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, 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 Positive TFT Photoresist Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Positive TFT Photoresist Market, Segmentation by Type:

i-Line Positive TFT Photoresist

g-Line Positive TFT Photoresist

Other

Global Positive TFT Photoresist Market, Segmentation by Coating Process:

Spin

Slit

Global Positive TFT Photoresist Market, Segmentation by Minimum Line Width:

<1.5µm

1.5-2µm

2-4µm

4-6µm

6-8µm

>8µm

Global Positive TFT Photoresist Market, Segmentation by Application:

AMOLED

LCD

Semiconductor Manufacturing

Other

Companies Profiled:

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)

Key Questions Answered:

1. How big is the global Positive TFT Photoresist market?
2. What is the demand of the global Positive TFT Photoresist market?

3. What is the year over year growth of the global Positive TFT Photoresist market?
4. What is the production and production value of the global Positive TFT Photoresist market?
5. Who are the key producers in the global Positive TFT Photoresist market?
6. What are the growth factors driving the market demand?

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