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Global Semiconductor Photoresist Thinners Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Photoresist Thinners market size is expected to reach $ 484 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Semiconductor photoresist thinner refers to an ultra-high-purity organic solvent or specially formulated solvent blend developed for lithography processes in integrated circuit wafer fabrication, compound semiconductor manufacturing, MEMS production, wafer-level packaging, and related applications. It is primarily used during photoresist spin coating for wafer pre-wetting, resist-reduced coating, wafer-edge bead removal, bevel and backside resist cleaning, coater-cup cleaning, resist-delivery line cleaning, and the rework of uncured photoresist coatings.

These products are typically based on solvents such as propylene glycol monomethyl ether (PGME) and propylene glycol monomethyl ether acetate (PGMEA). Depending on the photoresist resin system, dissolution performance, evaporation rate, surface tension, wettability, and coating-equipment process conditions, they may be supplied either as qualified single-solvent products or as multi-component solvent blends. A commonly used formulation in semiconductor lithography is the “73-type thinner,” which consists of PGME and PGMEA blended at an approximate weight ratio of 70:30. It is commonly referred to as 7:3 Thinner or EBR 70/30, with PGME accounting for approximately 70% and PGMEA for approximately 30%.

Tokyo Ohka Kogyo markets the corresponding product as OK73 Thinner, which is mainly used for removing photoresist from wafer edges and backsides and for cleaning coater cups. Merck markets comparable products under names such as AZ EBR 70/30 or EBR7030, primarily for edge bead removal, coater-cup rinsing, and wafer-backside

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rinsing. DONGJIN SEMICHEM's comparable 73-type product is commonly referred to as Thinner 73 in customer and market communications. Jiangsu Dynamic Chemical's corresponding product is DN73, a blend of PGME and its acetate derivative, PGMEA, which can be used for wafer pre-wetting before photoresist coating and for wafer-edge cleaning after coating.

The global supply structure is multi-layered. Large international materials platforms and specialist Japanese and Korean electronic-chemical companies occupy the strongest positions in high-volume wafer fabrication because they combine photoresist formulation expertise, ultra-high-purity manufacturing, customer-specific qualification, local technical support, and multinational delivery networks. Taiwan-based suppliers have developed a competitive cluster around purified solvents, 70/30 PGME–PGMEA formulations, customized EBR products, clean packaging, and proximity to major foundry and memory customers. Mainland Chinese suppliers are moving from general wet chemicals and single-solvent purification toward integrated portfolios covering photoresists, thinners, edge-cleaning agents, and other lithography ancillaries. The industry is also undergoing corporate specialization. Tokyo Ohka Kogyo acquired all shares of Germany-based micro resist technology in February 2025, expanding its presence in specialty photoresists, sensors, micro-optics, microfluidics, and research-oriented lithography materials.

Demand growth is supported by both capacity expansion and increasing lithography intensity. SEMI reported that the global semiconductor materials market reached US$73.2 billion in 2025, up 6.8% year on year, with wafer-fabrication materials totaling US$45.8 billion. Lithography-related materials and wet chemicals recorded particularly strong growth as process complexity increased and manufacturing requirements became more stringent. Installed global 300mm capacity is projected to rise by approximately 7% in 2026 and to maintain a similar expansion rate through 2029, while advanced-node capacity is expected to grow substantially through 2028. A larger installed base directly increases the volume of wafers requiring coating, edge rinsing, backside cleaning, pre-wetting, rework, and coating-tool maintenance. More importantly, advanced logic, DRAM, HBM, and complex memory devices require a greater number of patterning cycles and impose tighter limits on metals, particles, moisture, non-volatile residues, and lot-to-lot variation. Product differentiation is consequently moving beyond basic dissolution performance. Suppliers must optimize solvent compatibility with specific resist chemistries, evaporation behavior, wetting characteristics, edge profiles, defectivity, equipment materials, and exhaust conditions. RRC and pre-wet processes add another structural driver: they use thinner to improve spreading and reduce the volume of expensive photoresist dispensed per wafer. The result is a market in which

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chemical volume grows broadly with wafer activity, while revenue per unit is increasingly influenced by formulation complexity, purity level, process-node requirements, technical service, and customer qualification status.

Report Scope

This report studies the global Semiconductor Photoresist Thinners production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Semiconductor Photoresist Thinners total production and demand, 2021-2032, (Tons)

Global Semiconductor Photoresist Thinners total production value, 2021-2032, (USD Million)

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

Global Semiconductor Photoresist Thinners consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Semiconductor Photoresist Thinners domestic production, consumption, key domestic manufacturers and share

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

Global Semiconductor Photoresist Thinners production by Type, production,

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value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global Semiconductor Photoresist Thinners 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 Tokyo Ohka Kogyo Co., Ltd., FUJIFILM, Dongjin Semichem, ENF Technology Co., Ltd., Merck KGaA, KANTO-PPC Inc., Qnity Electronics, Inc., YCCHEM Co., Ltd., Chang Chun Group, Jiangsu Nata Opto-electronic Material Co., Ltd., 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 Semiconductor Photoresist Thinners market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (USD/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 Semiconductor Photoresist Thinners Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Semiconductor Photoresist Thinners Market, Segmentation by Type:

UP Grade Thinner

UP-S Grade Thinner

UP-SS Grade Thinner

Others

Global Semiconductor Photoresist Thinners Market, Segmentation by Application:

IC Front-end Wafer Fabrication

Advanced Packaging and Wafer-level Processing

Compound Semiconductor and Optoelectronics

MEMS, Sensors and Microsystem Fabrication

Photomask and E-beam Lithography

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Companies Profiled:

Tokyo Ohka Kogyo Co., Ltd.

FUJIFILM

Dongjin Semichem

ENF Technology Co., Ltd.

Merck KGaA

KANTO-PPC Inc.

Qnity Electronics, Inc.

YCCHEM Co., Ltd.

Chang Chun Group

Jiangsu Nata Opto-electronic Material Co., Ltd.

Tongcheng New Material Group Co., Ltd.

Crystal Clear Electronic Material Co., Ltd.

Xiamen Hengkun New Materials Technology Co., Ltd.

Kayaku Advanced Materials, Inc.

Allresist GmbH

KemLab Inc.

Solexir Technology

Jiangyin Jianghua Microelectronics Materials Co., Ltd.

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Shiny Chemical Industrial Co., Ltd.

San Fu Chemical Co., Ltd.

Daicel Corporation

ACHEM Technology Corporation

Shenzhen Rongda Photosensitive & Technology Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd

Jiangsu Kuangshun Photosensitivity New-Material Stock Co., Ltd

Jiangsu Dynamic Chemical Group Co., Ltd

Key Questions Answered:

1. How big is the global Semiconductor Photoresist Thinners market?

2. What is the demand of the global Semiconductor Photoresist Thinners market?

3. What is the year over year growth of the global Semiconductor Photoresist Thinners market?

4. What is the production and production value of the global Semiconductor Photoresist Thinners market?

5. Who are the key producers in the global Semiconductor Photoresist Thinners market?

6. What are the growth factors driving the market demand?

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