

Global Semiconductor Thinner Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Thinner market size is expected to reach \$ 659 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

Semiconductor thinner is a high-purity solvent-based ancillary chemical used in semiconductor lithography, display panel lithography, and selected advanced packaging lithography processes. Its core function is not general industrial dilution, but the precise removal of excess or residual photoresist from wafer or substrate edges, backsides, nozzles, coater cups, and pipelines after photoresist spin coating. In certain processes, it also supports pre-wetting, photoresist consumption reduction, rework and recoating, film thickness adjustment, and auxiliary cleaning. This product is typically based on PGMEA, PGME, butyl acetate, EEP, ethyl lactate, cyclohexanone, anisole, or proprietary solvent blends, and is differentiated into various grades through high-purity distillation, filtration, metal ion and particle control, formulation blending, recycling and purification, and customer-specific process adaptation. Its technical focus lies in solvency for specific photoresists, polyimides, anti-reflective coatings, or other coatings, as well as evaporation rate, viscosity, density, water content, metallic impurities, particle level, residual film removal, and defect control capability. Typical customers include wafer fabs, memory and logic chip manufacturers, display panel makers, advanced packaging companies, compound semiconductor companies, photoresist suppliers, and micro and nanofabrication research institutions.

The industry value of semiconductor thinner is shifting from ordinary solvent procurement to lithography process stability management. After photoresist is spin-coated onto a wafer, excess photoresist or residues can easily form on the wafer edge and backside. If they are not removed in time, particles, peeling, contamination, and pattern defects may occur during subsequent handling, baking, exposure, etching, and

cleaning steps. For this reason, mainstream suppliers generally include EBR, wafer backside cleaning, coater cup cleaning, nozzle cleaning, pipeline cleaning, pre-wetting, and rework and recoating within the same category of ancillary lithography chemicals. For wafer fabs, a thinner is not acceptable simply because it can dissolve photoresist. It must be jointly matched with photoresist type, coating and developing equipment, film thickness target, spin speed, baking temperature, wafer size, and defect specifications. At present, this type of product has become part of the lithography materials package, with functions including reducing residual film, lowering particle levels, stabilizing film thickness, improving equipment cleanliness, and improving yield. Therefore, competition in semiconductor thinner is moving from price and solvency toward integrated competition in purity, formulation compatibility, batch consistency, low metal contamination, low particle levels, cleaning efficiency, and customer qualification capability. From a product structure perspective, semiconductor thinner shows a clear pattern of multiple technology routes coexisting. PGMEA and PGME are the most common base solvent systems and are widely used as photoresist solvents, edge bead removers, and cleaning agents, while nBA, EEP, ethyl lactate, cyclohexanone, anisole, chlorobenzene, and proprietary blended systems play complementary roles depending on photoresist polarity, coating type, and process window. Semiconductor thinner formulations are not simple substitutes, but are developed around customers' process windows. Advanced nodes and high-end display processes impose stricter requirements on metal ions, particles, water content, and residual film control, making high-purity distillation, precision filtration, clean packaging, and stable batch quality the boundary of supplier capability. Customers' requirements for cost, environmental performance, and supply stability are also increasing. Future product iteration will focus on lower residues, fewer defects, higher purity, safer and more environmentally friendly solvent systems, more precise customer-specific formulations, and larger-scale stable supply. From a regional landscape perspective, the semiconductor thinner supply chain is highly concentrated around wafer manufacturing and display manufacturing clusters. Japanese companies, supported by long-term accumulation in photoresists and ancillary materials, occupy an important position in high-end lithography material systems. Korean companies are driven by domestic memory and logic customers and have developed relatively comprehensive electronic materials supply capabilities. Taiwanese companies have built multilayered support around wafer foundry, packaging, panel manufacturing, and electronic-grade solvent systems, while mainland Chinese companies are entering through ancillary photoresist materials, high-purity electronic chemicals, and domestic substitution. U.S. and German companies are more representative of global materials platforms and R&D-oriented suppliers, supporting cross-regional customer qualification and supply stability. Demand mainly comes from wafer fabs, memory manufacturers, advanced packaging plants, and display panel

makers in the United States, Japan, South Korea, Taiwan, mainland China, and Europe. As advanced-node capacity expands, AI chip and memory demand rises, coating scenarios in advanced packaging increase, and semiconductor supply chain localization advances, thinners as a small but critical category of wet electronic chemicals will continue to benefit.

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

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

Highlights and key features of the study

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

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

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

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

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

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

Global Semiconductor Thinner production by Main Solvent System, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global Semiconductor Thinner 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, Fujifilm, Merck, Solstice Advanced Materials, KANTO-PPC, ENF Technology, Dongjin Semichem, Allresist, KemLab, Solexir, 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 Thinner 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 Main Solvent System, 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 Thinner Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Thinner Market, Segmentation by Main Solvent System:

PGME System

Acetate System

Lactate System

Ketone System

Other

Global Semiconductor Thinner Market, Segmentation by Compatible Coating Type:

Positive Photoresist Type

Negative Photoresist Type

Global Semiconductor Thinner Market, Segmentation by Delivery Form:

Packaged Form

Drum Form

Global Semiconductor Thinner Market, Segmentation by Application:

Removing Edge Beads

Pre-Wetting Surfaces

Cleaning Equipment

Other

Companies Profiled:

Tokyo Ohka Kogyo

Fujifilm

Merck

Solstice Advanced Materials

KANTO-PPC

ENF Technology

Dongjin Semichem

Allresist

KemLab

Solexir

Qnity Electronics

Jiangsu Nata Opto-electronic Material

Xiamen Hengkun New Material Technology

OPALS Chemical Technology

Shiny Chemical Industrial

China Petrochemical Development

Sunlit Fluo & Chemical

Key Questions Answered:

1. How big is the global Semiconductor Thinner market?
2. What is the demand of the global Semiconductor Thinner market?
3. What is the year over year growth of the global Semiconductor Thinner market?
4. What is the production and production value of the global Semiconductor Thinner market?
5. Who are the key producers in the global Semiconductor Thinner market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Semiconductor Thinner Demand (2021-2032)
- 2.2 World Semiconductor Thinner Consumption by Region
 - 2.2.1 World Semiconductor Thinner Consumption by Region (2021-2026)
 - 2.2.2 World Semiconductor Thinner Consumption Forecast by Region (2027-2032)
- 2.3 United States Semiconductor Thinner Consumption (2021-2032)
- 2.4 China Semiconductor Thinner Consumption (2021-2032)
- 2.5 Europe Semiconductor Thinner Consumption (2021-2032)
- 2.6 Japan Semiconductor Thinner Consumption (2021-2032)
- 2.7 South Korea Semiconductor Thinner Consumption (2021-2032)
- 2.8 ASEAN Semiconductor Thinner Consumption (2021-2032)
- 2.9 India Semiconductor Thinner Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Semiconductor Thinner Production Value by Manufacturer (2021-2026)
- 3.2 World Semiconductor Thinner Production by Manufacturer (2021-2026)
- 3.3 World Semiconductor Thinner Average Price by Manufacturer (2021-2026)
- 3.4 Semiconductor Thinner Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Semiconductor Thinner Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Semiconductor Thinner in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Semiconductor Thinner in 2025
- 3.6 Semiconductor Thinner Market: Overall Company Footprint Analysis
 - 3.6.1 Semiconductor Thinner Market: Region Footprint
 - 3.6.2 Semiconductor Thinner Market: Company Product Type Footprint
 - 3.6.3 Semiconductor Thinner 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: Semiconductor Thinner Production Value Comparison
 - 4.1.1 United States VS China: Semiconductor Thinner Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Semiconductor Thinner Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Semiconductor Thinner Production Comparison
 - 4.2.1 United States VS China: Semiconductor Thinner Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Semiconductor Thinner Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Semiconductor Thinner Consumption Comparison
 - 4.3.1 United States VS China: Semiconductor Thinner Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Semiconductor Thinner Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Semiconductor Thinner Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Semiconductor Thinner Production Value (2021-2026)

4.4.3 United States Based Manufacturers Semiconductor Thinner Production (2021-2026)

4.5 China Based Semiconductor Thinner Manufacturers and Market Share

4.5.1 China Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Semiconductor Thinner Production Value (2021-2026)

4.5.3 China Based Manufacturers Semiconductor Thinner Production (2021-2026)

4.6 Rest of World Based Semiconductor Thinner Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Semiconductor Thinner Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Semiconductor Thinner Production (2021-2026)

5 MARKET ANALYSIS BY MAIN SOLVENT SYSTEM

5.1 World Semiconductor Thinner Market Size Overview by Main Solvent System: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Main Solvent System

5.2.1 PGME System

5.2.2 Acetate System

5.2.3 Lactate System

5.2.4 Ketone System

5.2.5 Other

5.3 Market Segment by Main Solvent System

5.3.1 World Semiconductor Thinner Production by Main Solvent System (2021-2032)

5.3.2 World Semiconductor Thinner Production Value by Main Solvent System (2021-2032)

5.3.3 World Semiconductor Thinner Average Price by Main Solvent System (2021-2032)

6 MARKET ANALYSIS BY COMPATIBLE COATING TYPE

6.1 World Semiconductor Thinner Market Size Overview by Compatible Coating Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Compatible Coating Type

6.2.1 Positive Photoresist Type

6.2.2 Negative Photoresist Type

6.3 Market Segment by Compatible Coating Type

6.3.1 World Semiconductor Thinner Production by Compatible Coating Type (2021-2032)

6.3.2 World Semiconductor Thinner Production Value by Compatible Coating Type (2021-2032)

6.3.3 World Semiconductor Thinner Average Price by Compatible Coating Type (2021-2032)

7 MARKET ANALYSIS BY DELIVERY FORM

7.1 World Semiconductor Thinner Market Size Overview by Delivery Form: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Delivery Form

7.2.1 Packaged Form

7.2.2 Drum Form

7.3 Market Segment by Delivery Form

7.3.1 World Semiconductor Thinner Production by Delivery Form (2021-2032)

7.3.2 World Semiconductor Thinner Production Value by Delivery Form (2021-2032)

7.3.3 World Semiconductor Thinner Average Price by Delivery Form (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Semiconductor Thinner Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Removing Edge Beads

8.2.2 Pre-Wetting Surfaces

8.2.3 Cleaning Equipment

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World Semiconductor Thinner Production by Application (2021-2032)

8.3.2 World Semiconductor Thinner Production Value by Application (2021-2032)

8.3.3 World Semiconductor Thinner Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Tokyo Ohka Kogyo

9.1.1 Tokyo Ohka Kogyo Details

9.1.2 Tokyo Ohka Kogyo Major Business

9.1.3 Tokyo Ohka Kogyo Semiconductor Thinner Product and Services

9.1.4 Tokyo Ohka Kogyo Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Tokyo Ohka Kogyo Recent Developments/Updates

9.1.6 Tokyo Ohka Kogyo Competitive Strengths & Weaknesses

9.2 Fujifilm

9.2.1 Fujifilm Details

9.2.2 Fujifilm Major Business

9.2.3 Fujifilm Semiconductor Thinner Product and Services

9.2.4 Fujifilm Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Fujifilm Recent Developments/Updates

9.2.6 Fujifilm Competitive Strengths & Weaknesses

9.3 Merck

9.3.1 Merck Details

9.3.2 Merck Major Business

9.3.3 Merck Semiconductor Thinner Product and Services

9.3.4 Merck Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Merck Recent Developments/Updates

9.3.6 Merck Competitive Strengths & Weaknesses

9.4 Solstice Advanced Materials

9.4.1 Solstice Advanced Materials Details

9.4.2 Solstice Advanced Materials Major Business

9.4.3 Solstice Advanced Materials Semiconductor Thinner Product and Services

9.4.4 Solstice Advanced Materials Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Solstice Advanced Materials Recent Developments/Updates

9.4.6 Solstice Advanced Materials Competitive Strengths & Weaknesses

9.5 KANTO-PPC

9.5.1 KANTO-PPC Details

9.5.2 KANTO-PPC Major Business

9.5.3 KANTO-PPC Semiconductor Thinner Product and Services

9.5.4 KANTO-PPC Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 KANTO-PPC Recent Developments/Updates

9.5.6 KANTO-PPC Competitive Strengths & Weaknesses

9.6 ENF Technology

9.6.1 ENF Technology Details

9.6.2 ENF Technology Major Business

9.6.3 ENF Technology Semiconductor Thinner Product and Services

9.6.4 ENF Technology Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 ENF Technology Recent Developments/Updates

9.6.6 ENF Technology Competitive Strengths & Weaknesses

9.7 Dongjin Semichem

9.7.1 Dongjin Semichem Details

9.7.2 Dongjin Semichem Major Business

9.7.3 Dongjin Semichem Semiconductor Thinner Product and Services

9.7.4 Dongjin Semichem Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Dongjin Semichem Recent Developments/Updates

9.7.6 Dongjin Semichem Competitive Strengths & Weaknesses

9.8 Allresist

9.8.1 Allresist Details

9.8.2 Allresist Major Business

9.8.3 Allresist Semiconductor Thinner Product and Services

9.8.4 Allresist Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Allresist Recent Developments/Updates

9.8.6 Allresist Competitive Strengths & Weaknesses

9.9 KemLab

9.9.1 KemLab Details

9.9.2 KemLab Major Business

9.9.3 KemLab Semiconductor Thinner Product and Services

9.9.4 KemLab Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 KemLab Recent Developments/Updates

9.9.6 KemLab Competitive Strengths & Weaknesses

9.10 Solexir

9.10.1 Solexir Details

9.10.2 Solexir Major Business

- 9.10.3 Solexir Semiconductor Thinner Product and Services
- 9.10.4 Solexir Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.10.5 Solexir Recent Developments/Updates
- 9.10.6 Solexir Competitive Strengths & Weaknesses
- 9.11 Qnity Electronics
 - 9.11.1 Qnity Electronics Details
 - 9.11.2 Qnity Electronics Major Business
 - 9.11.3 Qnity Electronics Semiconductor Thinner Product and Services
 - 9.11.4 Qnity Electronics Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Qnity Electronics Recent Developments/Updates
 - 9.11.6 Qnity Electronics Competitive Strengths & Weaknesses
- 9.12 Jiangsu Nata Opto-electronic Material
 - 9.12.1 Jiangsu Nata Opto-electronic Material Details
 - 9.12.2 Jiangsu Nata Opto-electronic Material Major Business
 - 9.12.3 Jiangsu Nata Opto-electronic Material Semiconductor Thinner Product and Services
 - 9.12.4 Jiangsu Nata Opto-electronic Material Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Jiangsu Nata Opto-electronic Material Recent Developments/Updates
 - 9.12.6 Jiangsu Nata Opto-electronic Material Competitive Strengths & Weaknesses
- 9.13 Xiamen Hengkun New Material Technology
 - 9.13.1 Xiamen Hengkun New Material Technology Details
 - 9.13.2 Xiamen Hengkun New Material Technology Major Business
 - 9.13.3 Xiamen Hengkun New Material Technology Semiconductor Thinner Product and Services
 - 9.13.4 Xiamen Hengkun New Material Technology Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Xiamen Hengkun New Material Technology Recent Developments/Updates
 - 9.13.6 Xiamen Hengkun New Material Technology Competitive Strengths & Weaknesses
- 9.14 OPALS Chemical Technology
 - 9.14.1 OPALS Chemical Technology Details
 - 9.14.2 OPALS Chemical Technology Major Business
 - 9.14.3 OPALS Chemical Technology Semiconductor Thinner Product and Services
 - 9.14.4 OPALS Chemical Technology Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 OPALS Chemical Technology Recent Developments/Updates

- 9.14.6 OPALS Chemical Technology Competitive Strengths & Weaknesses
- 9.15 Shiny Chemical Industrial
 - 9.15.1 Shiny Chemical Industrial Details
 - 9.15.2 Shiny Chemical Industrial Major Business
 - 9.15.3 Shiny Chemical Industrial Semiconductor Thinner Product and Services
 - 9.15.4 Shiny Chemical Industrial Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Shiny Chemical Industrial Recent Developments/Updates
 - 9.15.6 Shiny Chemical Industrial Competitive Strengths & Weaknesses
- 9.16 China Petrochemical Development
 - 9.16.1 China Petrochemical Development Details
 - 9.16.2 China Petrochemical Development Major Business
 - 9.16.3 China Petrochemical Development Semiconductor Thinner Product and Services
 - 9.16.4 China Petrochemical Development Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 China Petrochemical Development Recent Developments/Updates
 - 9.16.6 China Petrochemical Development Competitive Strengths & Weaknesses
- 9.17 Sunlit Fluo & Chemical
 - 9.17.1 Sunlit Fluo & Chemical Details
 - 9.17.2 Sunlit Fluo & Chemical Major Business
 - 9.17.3 Sunlit Fluo & Chemical Semiconductor Thinner Product and Services
 - 9.17.4 Sunlit Fluo & Chemical Semiconductor Thinner Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Sunlit Fluo & Chemical Recent Developments/Updates
 - 9.17.6 Sunlit Fluo & Chemical Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Semiconductor Thinner Industry Chain
- 10.2 Semiconductor Thinner Upstream Analysis
 - 10.2.1 Semiconductor Thinner Core Raw Materials
 - 10.2.2 Main Manufacturers of Semiconductor Thinner Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Semiconductor Thinner Production Mode
- 10.6 Semiconductor Thinner Procurement Model
- 10.7 Semiconductor Thinner Industry Sales Model and Sales Channels
 - 10.7.1 Semiconductor Thinner Sales Model
 - 10.7.2 Semiconductor Thinner Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Semiconductor Thinner Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Semiconductor Thinner Production Value by Region (2021-2026) & (USD Million)

Table 3. World Semiconductor Thinner Production Value by Region (2027-2032) & (USD Million)

Table 4. World Semiconductor Thinner Production Value Market Share by Region (2021-2026)

Table 5. World Semiconductor Thinner Production Value Market Share by Region (2027-2032)

Table 6. World Semiconductor Thinner Production by Region (2021-2026) & (Tons)

Table 7. World Semiconductor Thinner Production by Region (2027-2032) & (Tons)

Table 8. World Semiconductor Thinner Production Market Share by Region (2021-2026)

Table 9. World Semiconductor Thinner Production Market Share by Region (2027-2032)

Table 10. World Semiconductor Thinner Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Semiconductor Thinner Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Semiconductor Thinner Major Market Trends

Table 13. World Semiconductor Thinner Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Semiconductor Thinner Consumption by Region (2021-2026) & (Tons)

Table 15. World Semiconductor Thinner Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Semiconductor Thinner Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Semiconductor Thinner Producers in 2025

Table 18. World Semiconductor Thinner Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Semiconductor Thinner Producers in 2025

Table 20. World Semiconductor Thinner Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Semiconductor Thinner Company Evaluation Quadrant

Table 22. World Semiconductor Thinner Industry Rank of Major Manufacturers, Based

on Production Value in 2025

Table 23. Head Office and Semiconductor Thinner Production Site of Key Manufacturer

Table 24. Semiconductor Thinner Market: Company Product Type Footprint

Table 25. Semiconductor Thinner Market: Company Product Application Footprint

Table 26. Semiconductor Thinner Competitive Factors

Table 27. Semiconductor Thinner New Entrant and Capacity Expansion Plans

Table 28. Semiconductor Thinner Mergers & Acquisitions Activity

Table 29. United States VS China Semiconductor Thinner Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Semiconductor Thinner Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Semiconductor Thinner Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Semiconductor Thinner Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Semiconductor Thinner Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Semiconductor Thinner Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Semiconductor Thinner Production Market Share (2021-2026)

Table 37. China Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Semiconductor Thinner Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Semiconductor Thinner Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Semiconductor Thinner Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Semiconductor Thinner Production Market Share (2021-2026)

Table 42. Rest of World Based Semiconductor Thinner Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Semiconductor Thinner Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Semiconductor Thinner Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Semiconductor Thinner Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Semiconductor Thinner Production Market Share (2021-2026)

Table 47. World Semiconductor Thinner Production Value by Main Solvent System, (USD Million), 2021 & 2025 & 2032

Table 48. World Semiconductor Thinner Production by Main Solvent System (2021-2026) & (Tons)

Table 49. World Semiconductor Thinner Production by Main Solvent System (2027-2032) & (Tons)

Table 50. World Semiconductor Thinner Production Value by Main Solvent System (2021-2026) & (USD Million)

Table 51. World Semiconductor Thinner Production Value by Main Solvent System (2027-2032) & (USD Million)

Table 52. World Semiconductor Thinner Average Price by Main Solvent System (2021-2026) & (US\$/Ton)

Table 53. World Semiconductor Thinner Average Price by Main Solvent System (2027-2032) & (US\$/Ton)

Table 54. World Semiconductor Thinner Production Value by Compatible Coating Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Semiconductor Thinner Production by Compatible Coating Type (2021-2026) & (Tons)

Table 56. World Semiconductor Thinner Production by Compatible Coating Type (2027-2032) & (Tons)

Table 57. World Semiconductor Thinner Production Value by Compatible Coating Type (2021-2026) & (USD Million)

Table 58. World Semiconductor Thinner Production Value by Compatible Coating Type (2027-2032) & (USD Million)

Table 59. World Semiconductor Thinner Average Price by Compatible Coating Type (2021-2026) & (US\$/Ton)

Table 60. World Semiconductor Thinner Average Price by Compatible Coating Type (2027-2032) & (US\$/Ton)

Table 61. World Semiconductor Thinner Production Value by Delivery Form, (USD Million), 2021 & 2025 & 2032

Table 62. World Semiconductor Thinner Production by Delivery Form (2021-2026) & (Tons)

Table 63. World Semiconductor Thinner Production by Delivery Form (2027-2032) & (Tons)

Table 64. World Semiconductor Thinner Production Value by Delivery Form

(2021-2026) & (USD Million)

Table 65. World Semiconductor Thinner Production Value by Delivery Form

(2027-2032) & (USD Million)

Table 66. World Semiconductor Thinner Average Price by Delivery Form (2021-2026) & (US\$/Ton)

Table 67. World Semiconductor Thinner Average Price by Delivery Form (2027-2032) & (US\$/Ton)

Table 68. World Semiconductor Thinner Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Semiconductor Thinner Production by Application (2021-2026) & (Tons)

Table 70. World Semiconductor Thinner Production by Application (2027-2032) & (Tons)

Table 71. World Semiconductor Thinner Production Value by Application (2021-2026) & (USD Million)

Table 72. World Semiconductor Thinner Production Value by Application (2027-2032) & (USD Million)

Table 73. World Semiconductor Thinner Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Semiconductor Thinner Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Tokyo Ohka Kogyo Basic Information, Manufacturing Base and Competitors

Table 76. Tokyo Ohka Kogyo Major Business

Table 77. Tokyo Ohka Kogyo Semiconductor Thinner Product and Services

Table 78. Tokyo Ohka Kogyo Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Tokyo Ohka Kogyo Recent Developments/Updates

Table 80. Tokyo Ohka Kogyo Competitive Strengths & Weaknesses

Table 81. Fujifilm Basic Information, Manufacturing Base and Competitors

Table 82. Fujifilm Major Business

Table 83. Fujifilm Semiconductor Thinner Product and Services

Table 84. Fujifilm Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Fujifilm Recent Developments/Updates

Table 86. Fujifilm Competitive Strengths & Weaknesses

Table 87. Merck Basic Information, Manufacturing Base and Competitors

Table 88. Merck Major Business

Table 89. Merck Semiconductor Thinner Product and Services

Table 90. Merck Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Merck Recent Developments/Updates

Table 92. Merck Competitive Strengths & Weaknesses

Table 93. Solstice Advanced Materials Basic Information, Manufacturing Base and Competitors

Table 94. Solstice Advanced Materials Major Business

Table 95. Solstice Advanced Materials Semiconductor Thinner Product and Services

Table 96. Solstice Advanced Materials Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Solstice Advanced Materials Recent Developments/Updates

Table 98. Solstice Advanced Materials Competitive Strengths & Weaknesses

Table 99. KANTO-PPC Basic Information, Manufacturing Base and Competitors

Table 100. KANTO-PPC Major Business

Table 101. KANTO-PPC Semiconductor Thinner Product and Services

Table 102. KANTO-PPC Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. KANTO-PPC Recent Developments/Updates

Table 104. KANTO-PPC Competitive Strengths & Weaknesses

Table 105. ENF Technology Basic Information, Manufacturing Base and Competitors

Table 106. ENF Technology Major Business

Table 107. ENF Technology Semiconductor Thinner Product and Services

Table 108. ENF Technology Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. ENF Technology Recent Developments/Updates

Table 110. ENF Technology Competitive Strengths & Weaknesses

Table 111. Dongjin Semichem Basic Information, Manufacturing Base and Competitors

Table 112. Dongjin Semichem Major Business

Table 113. Dongjin Semichem Semiconductor Thinner Product and Services

Table 114. Dongjin Semichem Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Dongjin Semichem Recent Developments/Updates

Table 116. Dongjin Semichem Competitive Strengths & Weaknesses

Table 117. Allresist Basic Information, Manufacturing Base and Competitors

Table 118. Allresist Major Business

Table 119. Allresist Semiconductor Thinner Product and Services

Table 120. Allresist Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Allresist Recent Developments/Updates

Table 122. Allresist Competitive Strengths & Weaknesses

Table 123. KemLab Basic Information, Manufacturing Base and Competitors

Table 124. KemLab Major Business

Table 125. KemLab Semiconductor Thinner Product and Services

Table 126. KemLab Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. KemLab Recent Developments/Updates

Table 128. KemLab Competitive Strengths & Weaknesses

Table 129. Solexir Basic Information, Manufacturing Base and Competitors

Table 130. Solexir Major Business

Table 131. Solexir Semiconductor Thinner Product and Services

Table 132. Solexir Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Solexir Recent Developments/Updates

Table 134. Solexir Competitive Strengths & Weaknesses

Table 135. Qnity Electronics Basic Information, Manufacturing Base and Competitors

Table 136. Qnity Electronics Major Business

Table 137. Qnity Electronics Semiconductor Thinner Product and Services

Table 138. Qnity Electronics Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Qnity Electronics Recent Developments/Updates

Table 140. Qnity Electronics Competitive Strengths & Weaknesses

Table 141. Jiangsu Nata Opto-electronic Material Basic Information, Manufacturing Base and Competitors

Table 142. Jiangsu Nata Opto-electronic Material Major Business

Table 143. Jiangsu Nata Opto-electronic Material Semiconductor Thinner Product and Services

Table 144. Jiangsu Nata Opto-electronic Material Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Jiangsu Nata Opto-electronic Material Recent Developments/Updates

Table 146. Jiangsu Nata Opto-electronic Material Competitive Strengths & Weaknesses

Table 147. Xiamen Hengkun New Material Technology Basic Information, Manufacturing Base and Competitors

Table 148. Xiamen Hengkun New Material Technology Major Business

Table 149. Xiamen Hengkun New Material Technology Semiconductor Thinner Product and Services

Table 150. Xiamen Hengkun New Material Technology Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Xiamen Hengkun New Material Technology Recent Developments/Updates

Table 152. Xiamen Hengkun New Material Technology Competitive Strengths & Weaknesses

Table 153. OPALS Chemical Technology Basic Information, Manufacturing Base and Competitors

Table 154. OPALS Chemical Technology Major Business

Table 155. OPALS Chemical Technology Semiconductor Thinner Product and Services

Table 156. OPALS Chemical Technology Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. OPALS Chemical Technology Recent Developments/Updates

Table 158. OPALS Chemical Technology Competitive Strengths & Weaknesses

Table 159. Shiny Chemical Industrial Basic Information, Manufacturing Base and Competitors

Table 160. Shiny Chemical Industrial Major Business

Table 161. Shiny Chemical Industrial Semiconductor Thinner Product and Services

Table 162. Shiny Chemical Industrial Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Shiny Chemical Industrial Recent Developments/Updates

Table 164. Shiny Chemical Industrial Competitive Strengths & Weaknesses

Table 165. China Petrochemical Development Basic Information, Manufacturing Base and Competitors

Table 166. China Petrochemical Development Major Business

Table 167. China Petrochemical Development Semiconductor Thinner Product and Services

Table 168. China Petrochemical Development Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. China Petrochemical Development Recent Developments/Updates

Table 170. China Petrochemical Development Competitive Strengths & Weaknesses

Table 171. Sunlit Fluo & Chemical Basic Information, Manufacturing Base and Competitors

Table 172. Sunlit Fluo & Chemical Major Business

Table 173. Sunlit Fluo & Chemical Semiconductor Thinner Product and Services

Table 174. Sunlit Fluo & Chemical Semiconductor Thinner Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Sunlit Fluo & Chemical Recent Developments/Updates

Table 176. Sunlit Fluo & Chemical Competitive Strengths & Weaknesses

Table 177. Global Key Players of Semiconductor Thinner Upstream (Raw Materials)

Table 178. Global Semiconductor Thinner Typical Customers

Table 179. Semiconductor Thinner Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor Thinner Picture

Figure 2. World Semiconductor Thinner Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Semiconductor Thinner Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 5. World Semiconductor Thinner Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Semiconductor Thinner Production Value Market Share by Region (2021-2032)

Figure 7. World Semiconductor Thinner Production Market Share by Region (2021-2032)

Figure 8. North America Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 9. Europe Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 10. China Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 11. Japan Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 12. South Korea Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 13. China Taiwan Semiconductor Thinner Production (2021-2032) & (Tons)

Figure 14. Semiconductor Thinner Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 17. World Semiconductor Thinner Consumption Market Share by Region (2021-2032)

Figure 18. United States Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 19. China Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 20. Europe Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 21. Japan Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 22. South Korea Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 23. ASEAN Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 24. India Semiconductor Thinner Consumption (2021-2032) & (Tons)

Figure 25. Producer Shipments of Semiconductor Thinner by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Semiconductor Thinner Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Semiconductor Thinner Markets in 2025

Figure 28. United States VS China: Semiconductor Thinner Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Semiconductor Thinner Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Semiconductor Thinner Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Semiconductor Thinner Production Market Share 2025

Figure 32. China Based Manufacturers Semiconductor Thinner Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Semiconductor Thinner Production Market Share 2025

Figure 34. World Semiconductor Thinner Production Value by Main Solvent System, (USD Million), 2021 & 2025 & 2032

Figure 35. World Semiconductor Thinner Production Value Market Share by Main Solvent System in 2025

Figure 36. PGME System

Figure 37. Acetate System

Figure 38. Lactate System

Figure 39. Ketone System

Figure 40. Other

Figure 41. World Semiconductor Thinner Production Market Share by Main Solvent System (2021-2032)

Figure 42. World Semiconductor Thinner Production Value Market Share by Main Solvent System (2021-2032)

Figure 43. World Semiconductor Thinner Average Price by Main Solvent System (2021-2032) & (US\$/Ton)

Figure 44. World Semiconductor Thinner Production Value by Compatible Coating Type, (USD Million), 2021 & 2025 & 2032

Figure 45. World Semiconductor Thinner Production Value Market Share by Compatible Coating Type in 2025

Figure 46. Positive Photoresist Type

Figure 47. Negative Photoresist Type

Figure 48. World Semiconductor Thinner Production Market Share by Compatible Coating Type (2021-2032)

Figure 49. World Semiconductor Thinner Production Value Market Share by Compatible Coating Type (2021-2032)

Figure 50. World Semiconductor Thinner Average Price by Compatible Coating Type (2021-2032) & (US\$/Ton)

Figure 51. World Semiconductor Thinner Production Value by Delivery Form, (USD Million), 2021 & 2025 & 2032

Figure 52. World Semiconductor Thinner Production Value Market Share by Delivery Form in 2025

Figure 53. Packaged Form

Figure 54. Drum Form

Figure 55. World Semiconductor Thinner Production Market Share by Delivery Form (2021-2032)

Figure 56. World Semiconductor Thinner Production Value Market Share by Delivery Form (2021-2032)

Figure 57. World Semiconductor Thinner Average Price by Delivery Form (2021-2032) & (US\$/Ton)

Figure 58. World Semiconductor Thinner Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 59. World Semiconductor Thinner Production Value Market Share by Application in 2025

Figure 60. Removing Edge Beads

Figure 61. Pre-Wetting Surfaces

Figure 62. Cleaning Equipment

Figure 63. Other

Figure 64. World Semiconductor Thinner Production Market Share by Application (2021-2032)

Figure 65. World Semiconductor Thinner Production Value Market Share by Application (2021-2032)

Figure 66. World Semiconductor Thinner Average Price by Application (2021-2032) & (US\$/Ton)

Figure 67. Semiconductor Thinner Industry Chain

Figure 68. Semiconductor Thinner Procurement Model

Figure 69. Semiconductor Thinner Sales Model

Figure 70. Semiconductor Thinner Sales Channels, Direct Sales, and Distribution

Figure 71. Methodology

Figure 72. Research Process and Data Source

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