

Photoresist and Photoresist Ancillaries Market Report by Photoresist Type (ArF Immersion, KrF, ArF Dry, g- and i-line), Photoresist Ancillaries Type (Anti-Reflective Coatings, Remover, Developer, and Others), Application (Semiconductors & ICS, LCDs, Printed Circuit Boards, and Others), and Region 2024-2032

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Abstracts

The global photoresist and photoresist ancillaries market size reached US\$ 3.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5.7 Billion by 2032, exhibiting a growth rate (CAGR) of 4% during 2024-2032. The increasing demand for consumer electronics, continual technological advancements in semiconductor manufacturing and the emerging trend of device miniaturization represent some of the key factors driving the market.

The Increasing Demand for Consumer Electronic Devices is Accelerating the Market Growth

The photoresist and photoresist ancillaries market has been experiencing continuous growth. With the rise in demand for advanced electronic devices, there is a concurrent increase in demand for semiconductors. Photoresist and ancillaries is a critical component in the semiconductor manufacturing process, particularly in the production of microchips that power these devices. As a result, the demand for photoresist and ancillaries is expected to continue to rise in response to the increasing demand for smartphones, laptops, tablets, and other electronic devices, which is driving the growth of the market.

Competitive analysis such as market structure, market share by key players, player

positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. The market structure is concentrated with a small number of key players having majority of the share in the market. The volume of new entrants is low in the photoresist and photoresist ancillaries industry due to the high product differentiation, low number of raw material suppliers, and high initial investment.

What are Photoresist and Photoresist Ancillaries?

A photoresist is a light-sensitive material that undergoes a chemical change when exposed to light during the process of photolithography, which is a technique for creating patterns on a substrate, typically a silicon wafer. Depending on the chemistry of the resist, it can either be positive or negative. Photoresist ancillaries include adhesion promoters, edge bead removers, primers, and antireflective coatings, which are used in conjunction with photoresists to improve their performance or facilitate photolithography. Upon exposure to light, photoresist materials undergo a chemical change, and can be dissolved in a developer solution to reveal the patterned substrate. In order to create microelectronic devices, MEMS, or other microstructures, photoresists are used to create patterns on a substrate, while edge bead removers are used to remove excess photoresist from the substrate edges that can interfere with subsequent processing processes.

COVID-19 Impact:

The COVID-19 pandemic outbreak has caused a severe problem for the photoresist and photoresist ancillaries industry and imposed unprecedented challenges on numerous aspects. With regards to the imports of major raw materials required for manufacturing, the global crisis has resulted in challenges in obtaining necessary raw materials. Supply chains were impacted due to lockdown measures, with temporary production halts causing project delays and process disruptions. Logistics providers faced challenges in transporting goods, particularly across borders as well as manufacturers faced component shortages. However, the global market has been growing at a stable rate post-pandemic, and major companies have adjusted their production facilities in compliance with government directives to meet product demand.

Photoresist and Photoresist Ancillaries Market Trends:

The photoresist and photoresist ancillaries market is primarily driven by the widespread usage in flat-panel displays and consumer electronics. This can be attributed to the

continual technological advancements in the manufacturing of electrical and electronics devices. Additionally, the growing trend of miniaturization of electronic devices leading to an increased demand for photoresists and ancillaries for the manufacturing of smaller and more efficient semiconductors and ICs is providing an impetus to the market. The rising usage of the Internet of Things (IoT) resulting in IoT devices requiring advanced semiconductors and ICs is also creating lucrative opportunities in the market. The market is further driven by the numerous innovations in the manufacturing of medical devices and equipment. Apart from this, the augmenting demand for renewable energy technologies, such as solar panels, leading to the rapid utilization of photoresist and photoresist ancillaries in the production of solar cells is also fueling the market. Furthermore, numerous strategies such as merger and acquisitions (M&As), partnerships and collaborations conducted by key players to enhance their geographical presence are also acting as a significant growth-inducing factor. Some of the other factors contributing to the market include rapid urbanization and industrialization, inflating disposable income levels, the advent of autonomous and connected vehicles, and extensive research and development (R&D) activities.

Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global photoresist and photoresist ancillaries market report, along with forecasts at the global and regional levels from 2024-2032. Our report has categorized the market based on photoresist type, photoresist ancillaries type, and application.

Photoresist Type Insights:

ArF Immersion

KrF

ArF Dry

g- and i-line

The report has provided a detailed breakup and analysis of the photoresist and photoresist ancillaries market based on the photoresist type. This includes ArF Immersion, KrF, ArF Dry and g- and i-line. According to the report, KrF represented the largest segment due to the continual technological advancements in resolution enhancement techniques, such as offaxis illumination, proximity correction and phaseshifting mask. In addition, the demand for KrF has been largely influenced by the escalating demand for high thermal stability, ion implantation resistance, plasma etching, long-term stability and wide thickness coverage in the manufacturing of

electronic products.

Photoresist Ancillaries Type Insights:

Anti-Reflective Coatings

Remover

Developer

Others

A detailed breakup and analysis of the photoresist and photoresist ancillaries market based on the photoresist ancillaries type has also been provided in the report. This anti-reflective coatings, remover, developer, and others. According to the report, anti-reflective coatings accounted for the largest market share, due to the growing demand for electronic devices resulting in a corresponding increase in demand for anti-reflective coatings to enhance the performance and durability of display screens. Moreover, with the growing demand for renewable energy sources, the demand for anti-reflective coatings in the solar energy industry is expected to rise.

Application Insights:

Semiconductors & ICS

LCDs

Printed Circuit Boards

Others

A detailed breakup and analysis of the photoresist and photoresist ancillaries market based on the application has also been provided in the report. This includes semiconductors & ICS, LCDs, printed circuit boards, and others. According to the report, semiconductors & ICS accounted for the largest market share on account of the introduction of improved resolution of the photolithographic process and higher computing power at lower prices. In addition, the rapid expansion of the automotive industry resulting in the advent of connected and autonomous vehicles requiring more sophisticated semiconductors and ICs is fueling the segment growth.

Regional Insights:

Asia Pacific

North America

Europe

Middle East and Africa
Latin America

The report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, North America, Europe, the Middle East and Africa and Latin America. According to the report, Asia Pacific was the largest market for photoresist and photoresist ancillaries. Some of the factors driving the Asia Pacific photoresist and photoresist ancillaries market included the presence of several key players, emerging trend of device miniaturization, advent of autonomous and connected vehicles due to the rapid expansion of automotive industry and a higher uptake of consumer electronic devices.

Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the global photoresist and photoresist ancillaries market. Some of the companies covered in the report include:

Tokyo Ohka Kogyo Co., Ltd.
JSR Corporation
DuPont de Nemours Inc.
Shin-Etsu Chemical Co. Ltd.
Fujifilm Electronics Materials Co., Ltd.
Sumitomo Chemical Co., Ltd.
Merck Az Electronics Materials
Allresist GmbH
Avantor Performance Materials, LLC
Microchemicals GmbH

Please note that this only represents a partial list of companies, and the complete list has been provided in the report.

Key Questions Answered in This Report

1. How big is the global photoresist and photoresist ancillaries market?
2. What is the expected growth rate of the global photoresist and photoresist ancillaries market during 2024-2032?
3. What are the key factors driving the global photoresist and photoresist ancillaries market?

4. What has been the impact of COVID-19 on the global photoresist and photoresist ancillaries market?
5. What is the breakup of the global I photoresist and photoresist ancillaries market based on the photoresist type?
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7. What is the breakup of the global photoresist and photoresist ancillaries market based on the application?
8. What are the key regions in the global photoresist and photoresist ancillaries market?
9. Who are the key players/companies in the global photoresist and photoresist ancillaries market?

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