

Global ArFi Photoresist Market Growth 2026-2032

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Abstracts

The global ArFi Photoresist market size is predicted to grow from US\$ 872 million in 2025 to US\$ 1394 million in 2032; it is expected to grow at a CAGR of 7.0% from 2026 to 2032.

ArFi photoresist refers to a high-end semiconductor lithography material used in the 193 nanometer ArF immersion lithography process. Its core components typically include a 193 nanometer high transmittance host resin, photoacid generator, quencher, solvent, and functional additives. During exposure, fine pattern transfer is achieved through the combination of argon fluoride excimer laser and immersion medium. Compared to ordinary ArF dry photoresist, ArFi photoresist has higher requirements for low defects, low metal ions, low line edge roughness, immersion water compatibility, water penetration resistance, film thickness uniformity, depth of focus window, development stability, and batch consistency. It is mainly used for advanced logic chips, DRAM, NAND Flash, CIS image sensors, and some advanced packaging processes. Its typical single exposure resolution is about 35 nanometers to 45 nanometers, and when combined with dual patterning, multiple patterning, sidewall transfer, and hard mask processes, it can support the processing of some key layer patterns in advanced processes up to 28 nanometers. In 2025, global ArFi Photoresist production reached approximately 1,428 K L, with an average global market price of around US\$ 624 per L.

ArFi photoresist is a key material in semiconductor photoresist with high technical barriers, long customer certification cycles, and high supply chain concentration. Although EUV lithography continues to penetrate the most advanced logic nodes, ArFi remains one of the main materials in advanced processes and memory chip manufacturing, with long-term demand foundations in multi patterning, DRAM, NAND Flash, CIS image sensors, and mature advanced nodes. The future market growth will mainly come from the expansion of wafer fabs, storage cycle repair, CIS process upgrades, increased usage of advanced process multi graphics, and the promotion of

domestic substitution of Chinese semiconductor materials. Chinese companies such as Xuzhou Bokang Chemical Technology, Jingrui Electronic Materials, Tongcheng New Materials, Nanda Optoelectronics, Shanghai Xinyang, Xiamen Hengkun New Materials, and Beijing Xinyihua are promoting the research and development of ArF and ArFi photoresist and customer verification. However, continuous breakthroughs are still needed in the stability of submerged product mass production, defect control, low line edge roughness, metal ion control, long-term batch consistency, and the introduction of advanced wafer fabs. Overall, the market size of ArFi photoresist may not be the largest, but it has high unit value, strong strategic attributes, and difficulty in domestic substitution. In the future, the focus of competition will be on high resolution, low defect, low line edge roughness, immersion process adaptation, customer certification, and stable mass production capabilities.

LP Information, Inc. (LPI) ' newest research report, the "ArFi Photoresist Industry Forecast" looks at past sales and reviews total world ArFi Photoresist sales in 2025, providing a comprehensive analysis by region and market sector of projected ArFi Photoresist sales for 2026 through 2032. With ArFi Photoresist sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world ArFi Photoresist industry.

This Insight Report provides a comprehensive analysis of the global ArFi Photoresist landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ArFi Photoresist portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global ArFi Photoresist market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ArFi Photoresist and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ArFi Photoresist.

This report presents a comprehensive overview, market shares, and growth opportunities of ArFi Photoresist market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Positive ArFi Photoresist

Negative ArFi Photoresist

Segmentation by Resolution:

Resolution $\leq$ 10nm

Resolution $>$ 10nm

Segmentation by Applicable Process:

Poly

Metal

Via

Other

Segmentation by Application:

Logic Chip

Memory Chip

Advanced Packaging

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Tokyo Ohka Kogyo

JSR Corporation

Fujifilm

Qnity Electronics

Shin-Etsu Chemical

Sumitomo

YCCHEM

Xuzhou B&C Chemical Technology

Crystal Clear Electronic Material

Red Avenue New Materials Group

Jiangsu Nata Opto-electronic Material

Shanghai Sinyang Semiconductor Materials

Xiamen Hengkun New Materials Technology

Beijing Sineva Technology

Hubei Dinglong

Key Questions Addressed in this Report

What is the 10-year outlook for the global ArFi Photoresist market?

What factors are driving ArFi Photoresist market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ArFi Photoresist market opportunities vary by end market size?

How does ArFi Photoresist break out by Type, by Application?

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