

Global Dry Film Photoresist for Packaging Market Growth 2026-2032

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Abstracts

The global Dry Film Photoresist for Packaging market size is predicted to grow from US\$ 210 million in 2025 to US\$ 312 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Dry film photoresist for packaging refers to a sheet-type photosensitive material used for pattern transfer, circuit formation, metal plating, etching protection, and fine interconnect fabrication in semiconductor packaging processes. It is typically composed of photosensitive resin, photoinitiators, functional monomers, additives, and carrier films. Through lamination, exposure, development, plating, etching, and stripping, the material forms precise patterns on package substrates, wafer-level packages, panel-level packages, and chip interconnect structures. Compared with liquid photoresist, dry film photoresist offers better thickness uniformity, stable processing windows, high material utilization, suitability for large-area lamination, and strong compatibility with thicker metal patterning, making it a key material for advanced packaging, high-density package substrates, and high-reliability chip interconnect manufacturing.

In 2025, global Dry film photoresist for packaging production reached approximately 242 million Sqm, with an average global market price of around US\$ 887 per K Sqm.

The upstream raw materials of Dry film photoresist for packaging mainly include photopolymer resins, acrylic or epoxy-based binders, photoinitiators, monomers, oligomers, dyes, inhibitors, plasticizers, adhesion promoters, solvents, polyethylene terephthalate carrier film and polyethylene protective film. Typical upstream suppliers include Mitsubishi Chemical, Kuraray, Arkema, BASF, Evonik, Eastman, Dow, LG Chem, Toray, Toyobo, SKC, Kolon Industries, Mitsui Chemicals, Fujifilm, DIC, IGM Resins and other specialty chemical and functional film companies.

Dry film photoresist for packaging is mainly used in IC Package Substrate Circuit Patterning, Wafer-Level / Panel-Level Packaging RDL, Chip Interconnect, and Others. Major customers include Shinko Electric Industries, Unimicron, Nan Ya PCB, TSMC, ASE Technology, Amkor Technology, etc.

The gross margin of Dry film photoresist for packaging varies significantly by product grade, application field and customer qualification level. The gross margin is around 25%-50%.

By product type, Dry film photoresist for packaging can be segmented into Ultra-thin Dry Film ($\leq 15\ \mu\text{m}$), Thin Dry Film (15–50 μm), Standard Dry Film (50–100 μm), and Thick Dry Film ($>100\ \mu\text{m}$). Ultra-thin Dry Film ($\leq 15\ \mu\text{m}$) is mainly used in high-resolution and fine-line patterning applications where edge definition, development cleanliness, and thickness uniformity are critical. Thin Dry Film (15–50 μm) balances resolution and process adaptability, making it important for fine circuit formation, redistribution layer fabrication, and high-density interconnect structures. Standard Dry Film (50–100 μm) is widely used in package substrate circuit patterning, plating masks, and protective patterning, offering a balanced combination of performance, cost, and process stability. Thick Dry Film ($>100\ \mu\text{m}$) is primarily used for thick metal deposition, bumping, copper pillar formation, deep pattern structures, and packaging processes requiring strong plating resistance, where adhesion, plating durability, development integrity, and stripping performance are especially important.

In terms of application, Dry film photoresist for packaging is mainly used in IC Package Substrate Circuit Patterning, Wafer-Level / Panel-Level Packaging RDL, Chip Interconnect, and Others. IC Package Substrate Circuit Patterning is a major application area, as package substrates continue to move toward higher density, finer line width, narrower spacing, and multilayer architectures. This requires dry film photoresist to deliver high resolution, strong adhesion, chemical resistance, and dimensional stability. Wafer-Level / Panel-Level Packaging RDL applications require uniform large-area lamination, fine-pattern resolution, low defect density, and strong process consistency, driving demand for thin and ultra-thin dry films. Chip Interconnect applications focus on the formation quality of bumps, copper pillars, micro-bumps, and metal interconnect structures, where standard and thick dry films have strong relevance. Other applications include auxiliary packaging patterns, temporary protection, special plating structures, and customized semiconductor packaging processes.

Market growth is mainly driven by the upgrade of advanced packaging technologies,

rising demand for high-performance computing chips, expansion of artificial intelligence servers and data centers, growth in automotive electronics and power device packaging, higher package substrate density, increasing adoption of wafer-level and panel-level packaging, and the trend toward heterogeneous chip integration. As the cost and complexity of front-end process scaling continue to increase, packaging has become a more important path for improving system-level performance. Redistribution layers, chip interconnects, bumps, copper pillars, and high-density package substrates all require better dry film photoresist performance in resolution, thickness control, adhesion, plating resistance, and reliability. Suppliers with high-cleanliness production capability, stable batch control, strong technical support, and joint development capability with packaging customers are expected to gain stronger competitive positions.

Key market restraints include high technical barriers for advanced products, long customer qualification cycles, strict formulation and mass-production stability requirements, volatility in key raw material supply, rapid evolution of advanced packaging process routes, cyclical capital expenditure by wafer fabs and outsourced semiconductor assembly and test companies, intensifying price competition, and rising environmental and safety compliance requirements. Dry film photoresist for packaging must simultaneously meet requirements for lamination performance, exposure sensitivity, resolution, development behavior, plating resistance, stripping performance, and low defect density. Weakness in any single performance parameter may affect production yield. In addition, customer-specific differences in equipment, exposure energy, developer chemistry, plating systems, and substrate materials make product qualification complex and time-consuming. For new entrants, mass-production validation, reliability testing, process adaptation, and stable supply capability remain major barriers to entry.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Dry Film

Photoresist for Packaging 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 Dry Film Photoresist for Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Dry Film Photoresist for Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dry Film Photoresist for Packaging 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 Dry Film Photoresist for Packaging.

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

Segmentation by Type:

Ultra-thin Dry Film (<15 ?m)

Thin Dry Film (15–50 ?m)

Standard Dry Film (50–100 ?m)

Thick Dry Film (>100 ?m)

Segmentation by Development Method:

Aqueous-developable

Solvent-developable

Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Segmentation by Photochemical Reaction Mechanism:

Positive Dry Film Photoresist

Negative Dry Film Photoresist

Segmentation by Application:

IC Package Substrate Circuit Patterning

Wafer-Level / Panel-Level Packaging RDL

Chip Interconnect

Others

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.

Asahi Kasei Corporation

Eternal Materials

Resonac Corporation (Showa Denko Materials)

Qnity Electronics (DuPont Riston)

Hunan Initial New Materials

Nagase ChemteX America

Nippon Kayaku

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dry Film Photoresist for Packaging market?

What factors are driving Dry Film Photoresist for Packaging market growth, globally and by region?

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

How do Dry Film Photoresist for Packaging market opportunities vary by end market size?

How does Dry Film Photoresist for Packaging break out by Type, by Application?

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