

Global IC Photoresist Market Growth 2026-2032

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Abstracts

The global IC Photoresist market size is predicted to grow from US\$ 3266 million in 2025 to US\$ 5109 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

Photoresist is a chemical essential for semiconductor manufacturing. The photoresists known as a photosensitive material, initiate a chemical reaction in the light. It is a chemical that plays an essential role in photolithography, a technology that is involved in the manufacture of semiconductor devices. In the semiconductor manufacturing, the exposure process that a photoengraving technique is applied to reduce and transfer the design drawn on the original plate (photomask) onto the silicon chip. To create power-saving, high-performance semiconductors, the circuits that are to be transferred need to be rendered smaller.

Structurally, the mix in 2025 is still DUV-dominated: ArFi (~26.1%) + KrF (~25.5%) + g/i-Line (~24.6%) ? 76% of total value, reflecting the reality that even in leading-edge flows, EUV is used for the most intricate layers while many remaining layers continue to be patterned with DUV, and both platforms run in parallel for years. Within DUV, ArFi?s weight is also consistent with technology boundaries: for many ?mainstream-to-advanced mature? nodes, immersion ArF remains a foundational lithography capability. Meanwhile, EUV photoresists are the clear growth engine (rising from ~\$80M to ~\$374M from 2020 to 2025; fastest growth rate among your segments), but still only ~11.2% of the 2025 total?i.e., EUV is driving the growth, while DUV still carries the volume and breadth of layers.

Looking forward over the next few years, the direction is: EUV grows fastest; ArFi stays resilient; KrF and g/i-Line remain stable-to-slight growth; ArF Dry grows modestly; E-beam grows steadily but niche?each for different ?real-fab? reasons. EUV resists should keep outgrowing the market because EUV layer counts and EUV exposure

intensity rise with continued scaling, and the ecosystem is now also entering the High-NA EUV era (tool milestones such as acceptance testing and High-NA platform ramp are now public), which tightens resist requirements and pulls more innovation spend into EUV materials (stochastics/roughness/sensitivity tradeoffs, outgassing control, etc.). ArFi resists are likely to remain the 'workhorse premium DUV' category: even where EUV expands, ArFi continues to print many non-EUV layers and supports huge installed bases at 28/22/16/14nm-class and below, and a lot of capacity being added globally is still in ranges that rely on ArFi capability. ArF Dry typically tracks a broad swath of mature logic and specialty IC production, so expect low-to-mid single-digit growth driven more by wafer-start expansion and mix (specialty, analog, PMIC, CIS, etc.) than by 'node shrinks.' KrF should stay solid because it sits in the cost/performance sweet spot for many mature nodes and selected tighter-pattern layers where ArF isn't required; its main driver is mature-node capacity + automotive/industrial stability, with cyclicalty tied to overall wafer starts. g/i-Line is 'sticky' for thick resist and back-end / packaging-centric lithography, so advanced packaging scaling (more RDL layers, bumping/plating processes, wafer-/panel-level packaging) tends to underpin demand even when leading-edge front-end is soft; suppliers explicitly position g/i-line portfolios around thick-film variants and packaging-related patterning use-cases (including RDL). E-beam resists should grow steadily (but remain small) because advanced mask making?especially EUV masks?depends heavily on e-beam lithography resist performance, and mask complexity rises as design rules tighten. Macro-wise, a supportive tailwind for all categories is the expectation that wafer-fab investment and capacity expansion are lifted by AI-driven logic and memory demand into 2026-2027, which typically flows through into lithography materials consumption with a lag.

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

This Insight Report provides a comprehensive analysis of the global IC 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 IC Photoresist portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global IC Photoresist market.

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

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

Segmentation by Type:

EUV Photoresist

ArFi Photoresist

ArF Dry Photoresist

KrF Photoresist

g/i-Line

Others

Segmentation by Imaging Mechanism:

Positive Photoresists

Negative Photoresists

Segmentation by Process Node:

High End / Advanced 110nm

DRAM and NAND

Segmentation by Application:

IC Manufacturing

Advanced Packaging

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 CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

DuPont

Fujifilm

Sumitomo Chemical

Dongjin Semichem

Merck KGaA (AZ)

Allresist GmbH

Futurrex

KemLab? Inc

YCCHEM Co., Ltd

SK Materials Performance (SKMP)

Everlight Chemical

Red Avenue

Crystal Clear Electronic Material

Xuzhou B & C Chemical

Xiamen Hengkun New Material Technology

Jiangsu Aisen Semiconductor Material

Zhuhai Cornerstone Technologies

Shanghai Sinyang Semiconductor Materials

ShenZhen RongDa Photosensitive Science & Technology

SINEVA

Guoke Tianji

Jiangsu Nata Opto-electronic Material

PhiChem

Key Questions Addressed in this Report

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

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

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

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

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

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global IC Photoresist Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for IC Photoresist by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for IC Photoresist by Country/Region, 2021, 2025 & 2032
- 2.2 IC Photoresist Segment by Type
 - 2.2.1 EUV Photoresist
 - 2.2.2 ArFi Photoresist
 - 2.2.3 ArF Dry Photoresist
 - 2.2.4 KrF Photoresist
 - 2.2.5 g/i-Line
 - 2.2.6 Others
 - 2.2.7 IC Photoresist Sales by Type
 - 2.2.7.1 Global IC Photoresist Sales Market Share by Type (2021-2026)
 - 2.2.7.2 Global IC Photoresist Revenue and Market Share by Type (2021-2026)
 - 2.2.7.3 Global IC Photoresist Sale Price by Type (2021-2026)
- 2.3 IC Photoresist Segment by Imaging Mechanism
 - 2.3.1 Positive Photoresists
 - 2.3.2 Negative Photoresists
 - 2.3.3 IC Photoresist Sales by Imaging Mechanism
 - 2.3.3.1 Global IC Photoresist Sales Market Share by Imaging Mechanism (2021-2026)
 - 2.3.3.2 Global IC Photoresist Revenue and Market Share by Imaging Mechanism

(2021-2026)

2.3.3.3 Global IC Photoresist Sale Price by Imaging Mechanism (2021-2026)

2.4 IC Photoresist Segment by Process Node

2.4.1 High End / Advanced 110nm

2.4.4 DRAM and NAND

2.4.5 IC Photoresist Sales by Process Node

2.4.5.1 Global IC Photoresist Sales Market Share by Process Node (2021-2026)

2.4.5.2 Global IC Photoresist Revenue and Market Share by Process Node

(2021-2026)

2.4.5.3 Global IC Photoresist Sale Price by Process Node (2021-2026)

2.5 IC Photoresist Segment by Application

2.5.1 IC Manufacturing

2.5.2 Advanced Packaging

2.5.3 IC Photoresist Sales by Application

2.5.3.1 Global IC Photoresist Sale Market Share by Application (2021-2026)

2.5.3.2 Global IC Photoresist Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global IC Photoresist Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global IC Photoresist Breakdown Data by Company

3.1.1 Global IC Photoresist Annual Sales by Company (2021-2026)

3.1.2 Global IC Photoresist Sales Market Share by Company (2021-2026)

3.2 Global IC Photoresist Annual Revenue by Company (2021-2026)

3.2.1 Global IC Photoresist Revenue by Company (2021-2026)

3.2.2 Global IC Photoresist Revenue Market Share by Company (2021-2026)

3.3 Global IC Photoresist Sale Price by Company

3.4 Key Manufacturers IC Photoresist Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers IC Photoresist Product Location Distribution

3.4.2 Players IC Photoresist Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR IC PHOTORESIST BY GEOGRAPHIC REGION

- 4.1 World Historic IC Photoresist Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global IC Photoresist Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global IC Photoresist Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic IC Photoresist Market Size by Country/Region (2021-2026)
 - 4.2.1 Global IC Photoresist Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global IC Photoresist Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas IC Photoresist Sales Growth
- 4.4 APAC IC Photoresist Sales Growth
- 4.5 Europe IC Photoresist Sales Growth
- 4.6 Middle East & Africa IC Photoresist Sales Growth

5 AMERICAS

- 5.1 Americas IC Photoresist Sales by Country
 - 5.1.1 Americas IC Photoresist Sales by Country (2021-2026)
 - 5.1.2 Americas IC Photoresist Revenue by Country (2021-2026)
- 5.2 Americas IC Photoresist Sales by Type (2021-2026)
- 5.3 Americas IC Photoresist Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC IC Photoresist Sales by Region
 - 6.1.1 APAC IC Photoresist Sales by Region (2021-2026)
 - 6.1.2 APAC IC Photoresist Revenue by Region (2021-2026)
- 6.2 APAC IC Photoresist Sales by Type (2021-2026)
- 6.3 APAC IC Photoresist Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

7.1 Europe IC Photoresist by Country

7.1.1 Europe IC Photoresist Sales by Country (2021-2026)

7.1.2 Europe IC Photoresist Revenue by Country (2021-2026)

7.2 Europe IC Photoresist Sales by Type (2021-2026)

7.3 Europe IC Photoresist Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa IC Photoresist by Country

8.1.1 Middle East & Africa IC Photoresist Sales by Country (2021-2026)

8.1.2 Middle East & Africa IC Photoresist Revenue by Country (2021-2026)

8.2 Middle East & Africa IC Photoresist Sales by Type (2021-2026)

8.3 Middle East & Africa IC Photoresist Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of IC Photoresist

10.3 Manufacturing Process Analysis of IC Photoresist

10.4 Industry Chain Structure of IC Photoresist

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 IC Photoresist Distributors

11.3 IC Photoresist Customer

12 WORLD FORECAST REVIEW FOR IC PHOTORESIST BY GEOGRAPHIC REGION

12.1 Global IC Photoresist Market Size Forecast by Region

12.1.1 Global IC Photoresist Forecast by Region (2027-2032)

12.1.2 Global IC Photoresist Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global IC Photoresist Forecast by Type (2027-2032)

12.7 Global IC Photoresist Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 TOKYO OHKA KOGYO CO., LTD. (TOK)

13.1.1 TOKYO OHKA KOGYO CO., LTD. (TOK) Company Information

13.1.2 TOKYO OHKA KOGYO CO., LTD. (TOK) IC Photoresist Product Portfolios and Specifications

13.1.3 TOKYO OHKA KOGYO CO., LTD. (TOK) IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 TOKYO OHKA KOGYO CO., LTD. (TOK) Main Business Overview

13.1.5 TOKYO OHKA KOGYO CO., LTD. (TOK) Latest Developments

13.2 JSR

13.2.1 JSR Company Information

13.2.2 JSR IC Photoresist Product Portfolios and Specifications

13.2.3 JSR IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 JSR Main Business Overview

13.2.5 JSR Latest Developments

13.3 Shin-Etsu Chemical

13.3.1 Shin-Etsu Chemical Company Information

13.3.2 Shin-Etsu Chemical IC Photoresist Product Portfolios and Specifications

13.3.3 Shin-Etsu Chemical IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Shin-Etsu Chemical Main Business Overview

13.3.5 Shin-Etsu Chemical Latest Developments

13.4 DuPont

13.4.1 DuPont Company Information

13.4.2 DuPont IC Photoresist Product Portfolios and Specifications

13.4.3 DuPont IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 DuPont Main Business Overview

13.4.5 DuPont Latest Developments

13.5 Fujifilm

13.5.1 Fujifilm Company Information

13.5.2 Fujifilm IC Photoresist Product Portfolios and Specifications

13.5.3 Fujifilm IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Fujifilm Main Business Overview

13.5.5 Fujifilm Latest Developments

13.6 Sumitomo Chemical

13.6.1 Sumitomo Chemical Company Information

13.6.2 Sumitomo Chemical IC Photoresist Product Portfolios and Specifications

13.6.3 Sumitomo Chemical IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Sumitomo Chemical Main Business Overview

13.6.5 Sumitomo Chemical Latest Developments

13.7 Dongjin Semichem

13.7.1 Dongjin Semichem Company Information

13.7.2 Dongjin Semichem IC Photoresist Product Portfolios and Specifications

13.7.3 Dongjin Semichem IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Dongjin Semichem Main Business Overview

13.7.5 Dongjin Semichem Latest Developments

13.8 Merck KGaA (AZ)

13.8.1 Merck KGaA (AZ) Company Information

13.8.2 Merck KGaA (AZ) IC Photoresist Product Portfolios and Specifications

13.8.3 Merck KGaA (AZ) IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Merck KGaA (AZ) Main Business Overview

13.8.5 Merck KGaA (AZ) Latest Developments

13.9 Allresist GmbH

13.9.1 Allresist GmbH Company Information

- 13.9.2 Allresist GmbH IC Photoresist Product Portfolios and Specifications
- 13.9.3 Allresist GmbH IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.9.4 Allresist GmbH Main Business Overview
- 13.9.5 Allresist GmbH Latest Developments
- 13.10 Futurrex
 - 13.10.1 Futurrex Company Information
 - 13.10.2 Futurrex IC Photoresist Product Portfolios and Specifications
 - 13.10.3 Futurrex IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Futurrex Main Business Overview
 - 13.10.5 Futurrex Latest Developments
- 13.11 KemLab? Inc
 - 13.11.1 KemLab? Inc Company Information
 - 13.11.2 KemLab? Inc IC Photoresist Product Portfolios and Specifications
 - 13.11.3 KemLab? Inc IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 KemLab? Inc Main Business Overview
 - 13.11.5 KemLab? Inc Latest Developments
- 13.12 YCCHEM Co., Ltd
 - 13.12.1 YCCHEM Co., Ltd Company Information
 - 13.12.2 YCCHEM Co., Ltd IC Photoresist Product Portfolios and Specifications
 - 13.12.3 YCCHEM Co., Ltd IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 YCCHEM Co., Ltd Main Business Overview
 - 13.12.5 YCCHEM Co., Ltd Latest Developments
- 13.13 SK Materials Performance (SKMP)
 - 13.13.1 SK Materials Performance (SKMP) Company Information
 - 13.13.2 SK Materials Performance (SKMP) IC Photoresist Product Portfolios and Specifications
 - 13.13.3 SK Materials Performance (SKMP) IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 SK Materials Performance (SKMP) Main Business Overview
 - 13.13.5 SK Materials Performance (SKMP) Latest Developments
- 13.14 Everlight Chemical
 - 13.14.1 Everlight Chemical Company Information
 - 13.14.2 Everlight Chemical IC Photoresist Product Portfolios and Specifications
 - 13.14.3 Everlight Chemical IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Everlight Chemical Main Business Overview

- 13.14.5 Everlight Chemical Latest Developments
- 13.15 Red Avenue
 - 13.15.1 Red Avenue Company Information
 - 13.15.2 Red Avenue IC Photoresist Product Portfolios and Specifications
 - 13.15.3 Red Avenue IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Red Avenue Main Business Overview
 - 13.15.5 Red Avenue Latest Developments
- 13.16 Crystal Clear Electronic Material
 - 13.16.1 Crystal Clear Electronic Material Company Information
 - 13.16.2 Crystal Clear Electronic Material IC Photoresist Product Portfolios and Specifications
 - 13.16.3 Crystal Clear Electronic Material IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Crystal Clear Electronic Material Main Business Overview
 - 13.16.5 Crystal Clear Electronic Material Latest Developments
- 13.17 Xuzhou B & C Chemical
 - 13.17.1 Xuzhou B & C Chemical Company Information
 - 13.17.2 Xuzhou B & C Chemical IC Photoresist Product Portfolios and Specifications
 - 13.17.3 Xuzhou B & C Chemical IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Xuzhou B & C Chemical Main Business Overview
 - 13.17.5 Xuzhou B & C Chemical Latest Developments
- 13.18 Xiamen Hengkun New Material Technology
 - 13.18.1 Xiamen Hengkun New Material Technology Company Information
 - 13.18.2 Xiamen Hengkun New Material Technology IC Photoresist Product Portfolios and Specifications
 - 13.18.3 Xiamen Hengkun New Material Technology IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Xiamen Hengkun New Material Technology Main Business Overview
 - 13.18.5 Xiamen Hengkun New Material Technology Latest Developments
- 13.19 Jiangsu Aisen Semiconductor Material
 - 13.19.1 Jiangsu Aisen Semiconductor Material Company Information
 - 13.19.2 Jiangsu Aisen Semiconductor Material IC Photoresist Product Portfolios and Specifications
 - 13.19.3 Jiangsu Aisen Semiconductor Material IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Jiangsu Aisen Semiconductor Material Main Business Overview
 - 13.19.5 Jiangsu Aisen Semiconductor Material Latest Developments

13.20 Zhuhai Cornerstone Technologies

13.20.1 Zhuhai Cornerstone Technologies Company Information

13.20.2 Zhuhai Cornerstone Technologies IC Photoresist Product Portfolios and Specifications

13.20.3 Zhuhai Cornerstone Technologies IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Zhuhai Cornerstone Technologies Main Business Overview

13.20.5 Zhuhai Cornerstone Technologies Latest Developments

13.21 Shanghai Sinyang Semiconductor Materials

13.21.1 Shanghai Sinyang Semiconductor Materials Company Information

13.21.2 Shanghai Sinyang Semiconductor Materials IC Photoresist Product Portfolios and Specifications

13.21.3 Shanghai Sinyang Semiconductor Materials IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Shanghai Sinyang Semiconductor Materials Main Business Overview

13.21.5 Shanghai Sinyang Semiconductor Materials Latest Developments

13.22 ShenZhen RongDa Photosensitive Science & Technology

13.22.1 ShenZhen RongDa Photosensitive Science & Technology Company Information

13.22.2 ShenZhen RongDa Photosensitive Science & Technology IC Photoresist Product Portfolios and Specifications

13.22.3 ShenZhen RongDa Photosensitive Science & Technology IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 ShenZhen RongDa Photosensitive Science & Technology Main Business Overview

13.22.5 ShenZhen RongDa Photosensitive Science & Technology Latest Developments

13.23 SINEVA

13.23.1 SINEVA Company Information

13.23.2 SINEVA IC Photoresist Product Portfolios and Specifications

13.23.3 SINEVA IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 SINEVA Main Business Overview

13.23.5 SINEVA Latest Developments

13.24 Guoke Tianji

13.24.1 Guoke Tianji Company Information

13.24.2 Guoke Tianji IC Photoresist Product Portfolios and Specifications

13.24.3 Guoke Tianji IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Guoke Tianji Main Business Overview

- 13.24.5 Guoke Tianji Latest Developments
- 13.25 Jiangsu Nata Opto-electronic Material
 - 13.25.1 Jiangsu Nata Opto-electronic Material Company Information
 - 13.25.2 Jiangsu Nata Opto-electronic Material IC Photoresist Product Portfolios and Specifications
 - 13.25.3 Jiangsu Nata Opto-electronic Material IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.25.4 Jiangsu Nata Opto-electronic Material Main Business Overview
 - 13.25.5 Jiangsu Nata Opto-electronic Material Latest Developments
- 13.26 PhiChem
 - 13.26.1 PhiChem Company Information
 - 13.26.2 PhiChem IC Photoresist Product Portfolios and Specifications
 - 13.26.3 PhiChem IC Photoresist Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.26.4 PhiChem Main Business Overview
 - 13.26.5 PhiChem Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. IC Photoresist Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. IC Photoresist Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of EUV Photoresist
- Table 4. Major Players of ArFi Photoresist
- Table 5. Major Players of ArF Dry Photoresist
- Table 6. Major Players of KrF Photoresist
- Table 7. Major Players of g/i-Line
- Table 8. Major Players of Others
- Table 9. Global IC Photoresist Sales by Type (2021-2026) & (K Gallon)
- Table 10. Global IC Photoresist Sales Market Share by Type (2021-2026)
- Table 11. Global IC Photoresist Revenue by Type (2021-2026) & (\$ million)
- Table 12. Global IC Photoresist Revenue Market Share by Type (2021-2026)
- Table 13. Global IC Photoresist Sale Price by Type (2021-2026) & (USD/Gallon)
- Table 14. Major Players of Positive Photoresists
- Table 15. Major Players of Negative Photoresists
- Table 16. Global IC Photoresist Sales by Imaging Mechanism (2021-2026) & (K Gallon)
- Table 17. Global IC Photoresist Sales Market Share by Imaging Mechanism (2021-2026)
- Table 18. Global IC Photoresist Revenue by Imaging Mechanism (2021-2026) & (\$ million)
- Table 19. Global IC Photoresist Revenue Market Share by Imaging Mechanism (2021-2026)
- Table 20. Global IC Photoresist Sale Price by Imaging Mechanism (2021-2026) & (USD/Gallon)
- Table 21. Major Players of High End / Advanced 110nm
- Table 24. Major Players of DRAM and NAND
- Table 25. Global IC Photoresist Sales by Process Node (2021-2026) & (K Gallon)
- Table 26. Global IC Photoresist Sales Market Share by Process Node (2021-2026)
- Table 27. Global IC Photoresist Revenue by Process Node (2021-2026) & (\$ million)
- Table 28. Global IC Photoresist Revenue Market Share by Process Node (2021-2026)
- Table 29. Global IC Photoresist Sale Price by Process Node (2021-2026) & (USD/Gallon)
- Table 30. Global IC Photoresist Sale by Application (2021-2026) & (K Gallon)

Table 31. Global IC Photoresist Sale Market Share by Application (2021-2026)
Table 32. Global IC Photoresist Revenue by Application (2021-2026) & (\$ million)
Table 33. Global IC Photoresist Revenue Market Share by Application (2021-2026)
Table 34. Global IC Photoresist Sale Price by Application (2021-2026) & (USD/Gallon)
Table 35. Global IC Photoresist Sales by Company (2021-2026) & (K Gallon)
Table 36. Global IC Photoresist Sales Market Share by Company (2021-2026)
Table 37. Global IC Photoresist Revenue by Company (2021-2026) & (\$ millions)
Table 38. Global IC Photoresist Revenue Market Share by Company (2021-2026)
Table 39. Global IC Photoresist Sale Price by Company (2021-2026) & (USD/Gallon)
Table 40. Key Manufacturers IC Photoresist Producing Area Distribution and Sales Area
Table 41. Players IC Photoresist Products Offered
Table 42. IC Photoresist Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 43. New Products and Potential Entrants
Table 44. Market M&A Activity & Strategy
Table 45. Global IC Photoresist Sales by Geographic Region (2021-2026) & (K Gallon)
Table 46. Global IC Photoresist Sales Market Share Geographic Region (2021-2026)
Table 47. Global IC Photoresist Revenue by Geographic Region (2021-2026) & (\$ millions)
Table 48. Global IC Photoresist Revenue Market Share by Geographic Region (2021-2026)
Table 49. Global IC Photoresist Sales by Country/Region (2021-2026) & (K Gallon)
Table 50. Global IC Photoresist Sales Market Share by Country/Region (2021-2026)
Table 51. Global IC Photoresist Revenue by Country/Region (2021-2026) & (\$ millions)
Table 52. Global IC Photoresist Revenue Market Share by Country/Region (2021-2026)
Table 53. Americas IC Photoresist Sales by Country (2021-2026) & (K Gallon)
Table 54. Americas IC Photoresist Sales Market Share by Country (2021-2026)
Table 55. Americas IC Photoresist Revenue by Country (2021-2026) & (\$ millions)
Table 56. Americas IC Photoresist Sales by Type (2021-2026) & (K Gallon)
Table 57. Americas IC Photoresist Sales by Application (2021-2026) & (K Gallon)
Table 58. APAC IC Photoresist Sales by Region (2021-2026) & (K Gallon)
Table 59. APAC IC Photoresist Sales Market Share by Region (2021-2026)
Table 60. APAC IC Photoresist Revenue by Region (2021-2026) & (\$ millions)
Table 61. APAC IC Photoresist Sales by Type (2021-2026) & (K Gallon)
Table 62. APAC IC Photoresist Sales by Application (2021-2026) & (K Gallon)
Table 63. Europe IC Photoresist Sales by Country (2021-2026) & (K Gallon)
Table 64. Europe IC Photoresist Revenue by Country (2021-2026) & (\$ millions)
Table 65. Europe IC Photoresist Sales by Type (2021-2026) & (K Gallon)
Table 66. Europe IC Photoresist Sales by Application (2021-2026) & (K Gallon)
Table 67. Middle East & Africa IC Photoresist Sales by Country (2021-2026) & (K

Gallon)

Table 68. Middle East & Africa IC Photoresist Revenue Market Share by Country (2021-2026)

Table 69. Middle East & Africa IC Photoresist Sales by Type (2021-2026) & (K Gallon)

Table 70. Middle East & Africa IC Photoresist Sales by Application (2021-2026) & (K Gallon)

Table 71. Key Market Drivers & Growth Opportunities of IC Photoresist

Table 72. Key Market Challenges & Risks of IC Photoresist

Table 73. Key Industry Trends of IC Photoresist

Table 74. IC Photoresist Raw Material

Table 75. Key Suppliers of Raw Materials

Table 76. IC Photoresist Distributors List

Table 77. IC Photoresist Customer List

Table 78. Global IC Photoresist Sales Forecast by Region (2027-2032) & (K Gallon)

Table 79. Global IC Photoresist Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Americas IC Photoresist Sales Forecast by Country (2027-2032) & (K Gallon)

Table 81. Americas IC Photoresist Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. APAC IC Photoresist Sales Forecast by Region (2027-2032) & (K Gallon)

Table 83. APAC IC Photoresist Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 84. Europe IC Photoresist Sales Forecast by Country (2027-2032) & (K Gallon)

Table 85. Europe IC Photoresist Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Middle East & Africa IC Photoresist Sales Forecast by Country (2027-2032) & (K Gallon)

Table 87. Middle East & Africa IC Photoresist Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 88. Global IC Photoresist Sales Forecast by Type (2027-2032) & (K Gallon)

Table 89. Global IC Photoresist Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 90. Global IC Photoresist Sales Forecast by Application (2027-2032) & (K Gallon)

Table 91. Global IC Photoresist Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 92. TOKYO OHKA KOGYO CO., LTD. (TOK) Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 93. TOKYO OHKA KOGYO CO., LTD. (TOK) IC Photoresist Product Portfolios and Specifications

Table 94. TOKYO OHKA KOGYO CO., LTD. (TOK) IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 95. TOKYO OHKA KOGYO CO., LTD. (TOK) Main Business

Table 96. TOKYO OHKA KOGYO CO., LTD. (TOK) Latest Developments

Table 97. JSR Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 98. JSR IC Photoresist Product Portfolios and Specifications

Table 99. JSR IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 100. JSR Main Business

Table 101. JSR Latest Developments

Table 102. Shin-Etsu Chemical Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 103. Shin-Etsu Chemical IC Photoresist Product Portfolios and Specifications

Table 104. Shin-Etsu Chemical IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 105. Shin-Etsu Chemical Main Business

Table 106. Shin-Etsu Chemical Latest Developments

Table 107. DuPont Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 108. DuPont IC Photoresist Product Portfolios and Specifications

Table 109. DuPont IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 110. DuPont Main Business

Table 111. DuPont Latest Developments

Table 112. Fujifilm Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 113. Fujifilm IC Photoresist Product Portfolios and Specifications

Table 114. Fujifilm IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 115. Fujifilm Main Business

Table 116. Fujifilm Latest Developments

Table 117. Sumitomo Chemical Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 118. Sumitomo Chemical IC Photoresist Product Portfolios and Specifications

Table 119. Sumitomo Chemical IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 120. Sumitomo Chemical Main Business

Table 121. Sumitomo Chemical Latest Developments

Table 122. Dongjin Semichem Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 123. Dongjin Semichem IC Photoresist Product Portfolios and Specifications
Table 124. Dongjin Semichem IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 125. Dongjin Semichem Main Business
Table 126. Dongjin Semichem Latest Developments
Table 127. Merck KGaA (AZ) Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 128. Merck KGaA (AZ) IC Photoresist Product Portfolios and Specifications
Table 129. Merck KGaA (AZ) IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 130. Merck KGaA (AZ) Main Business
Table 131. Merck KGaA (AZ) Latest Developments
Table 132. Allresist GmbH Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 133. Allresist GmbH IC Photoresist Product Portfolios and Specifications
Table 134. Allresist GmbH IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 135. Allresist GmbH Main Business
Table 136. Allresist GmbH Latest Developments
Table 137. Futurrex Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 138. Futurrex IC Photoresist Product Portfolios and Specifications
Table 139. Futurrex IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 140. Futurrex Main Business
Table 141. Futurrex Latest Developments
Table 142. KemLab? Inc Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 143. KemLab? Inc IC Photoresist Product Portfolios and Specifications
Table 144. KemLab? Inc IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 145. KemLab? Inc Main Business
Table 146. KemLab? Inc Latest Developments
Table 147. YCCHEM Co., Ltd Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 148. YCCHEM Co., Ltd IC Photoresist Product Portfolios and Specifications
Table 149. YCCHEM Co., Ltd IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 150. YCCHEM Co., Ltd Main Business

Table 151. YCCHEM Co., Ltd Latest Developments
Table 152. SK Materials Performance (SKMP) Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 153. SK Materials Performance (SKMP) IC Photoresist Product Portfolios and Specifications
Table 154. SK Materials Performance (SKMP) IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 155. SK Materials Performance (SKMP) Main Business
Table 156. SK Materials Performance (SKMP) Latest Developments
Table 157. Everlight Chemical Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 158. Everlight Chemical IC Photoresist Product Portfolios and Specifications
Table 159. Everlight Chemical IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 160. Everlight Chemical Main Business
Table 161. Everlight Chemical Latest Developments
Table 162. Red Avenue Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 163. Red Avenue IC Photoresist Product Portfolios and Specifications
Table 164. Red Avenue IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 165. Red Avenue Main Business
Table 166. Red Avenue Latest Developments
Table 167. Crystal Clear Electronic Material Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 168. Crystal Clear Electronic Material IC Photoresist Product Portfolios and Specifications
Table 169. Crystal Clear Electronic Material IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 170. Crystal Clear Electronic Material Main Business
Table 171. Crystal Clear Electronic Material Latest Developments
Table 172. Xuzhou B & C Chemical Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 173. Xuzhou B & C Chemical IC Photoresist Product Portfolios and Specifications
Table 174. Xuzhou B & C Chemical IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 175. Xuzhou B & C Chemical Main Business
Table 176. Xuzhou B & C Chemical Latest Developments
Table 177. Xiamen Hengkun New Material Technology Basic Information, IC

Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 178. Xiamen Hengkun New Material Technology IC Photoresist Product Portfolios and Specifications

Table 179. Xiamen Hengkun New Material Technology IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 180. Xiamen Hengkun New Material Technology Main Business

Table 181. Xiamen Hengkun New Material Technology Latest Developments

Table 182. Jiangsu Aisen Semiconductor Material Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 183. Jiangsu Aisen Semiconductor Material IC Photoresist Product Portfolios and Specifications

Table 184. Jiangsu Aisen Semiconductor Material IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 185. Jiangsu Aisen Semiconductor Material Main Business

Table 186. Jiangsu Aisen Semiconductor Material Latest Developments

Table 187. Zhuhai Cornerstone Technologies Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 188. Zhuhai Cornerstone Technologies IC Photoresist Product Portfolios and Specifications

Table 189. Zhuhai Cornerstone Technologies IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 190. Zhuhai Cornerstone Technologies Main Business

Table 191. Zhuhai Cornerstone Technologies Latest Developments

Table 192. Shanghai Sinyang Semiconductor Materials Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 193. Shanghai Sinyang Semiconductor Materials IC Photoresist Product Portfolios and Specifications

Table 194. Shanghai Sinyang Semiconductor Materials IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 195. Shanghai Sinyang Semiconductor Materials Main Business

Table 196. Shanghai Sinyang Semiconductor Materials Latest Developments

Table 197. ShenZhen RongDa Photosensitive Science & Technology Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors

Table 198. ShenZhen RongDa Photosensitive Science & Technology IC Photoresist Product Portfolios and Specifications

Table 199. ShenZhen RongDa Photosensitive Science & Technology IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)

Table 200. ShenZhen RongDa Photosensitive Science & Technology Main Business

Table 201. ShenZhen RongDa Photosensitive Science & Technology Latest Developments
Table 202. SINEVA Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 203. SINEVA IC Photoresist Product Portfolios and Specifications
Table 204. SINEVA IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 205. SINEVA Main Business
Table 206. SINEVA Latest Developments
Table 207. Guoke Tianji Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 208. Guoke Tianji IC Photoresist Product Portfolios and Specifications
Table 209. Guoke Tianji IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 210. Guoke Tianji Main Business
Table 211. Guoke Tianji Latest Developments
Table 212. Jiangsu Nata Opto-electronic Material Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 213. Jiangsu Nata Opto-electronic Material IC Photoresist Product Portfolios and Specifications
Table 214. Jiangsu Nata Opto-electronic Material IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 215. Jiangsu Nata Opto-electronic Material Main Business
Table 216. Jiangsu Nata Opto-electronic Material Latest Developments
Table 217. PhiChem Basic Information, IC Photoresist Manufacturing Base, Sales Area and Its Competitors
Table 218. PhiChem IC Photoresist Product Portfolios and Specifications
Table 219. PhiChem IC Photoresist Sales (K Gallon), Revenue (\$ Million), Price (USD/Gallon) and Gross Margin (2021-2026)
Table 220. PhiChem Main Business
Table 221. PhiChem Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of IC Photoresist
- Figure 2. IC Photoresist Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global IC Photoresist Sales Growth Rate 2021-2032 (K Gallon)
- Figure 7. Global IC Photoresist Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. IC Photoresist Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. IC Photoresist Sales Market Share by Country/Region (2025)
- Figure 10. IC Photoresist Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of EUV Photoresist
- Figure 12. Product Picture of ArFi Photoresist
- Figure 13. Product Picture of ArF Dry Photoresist
- Figure 14. Product Picture of KrF Photoresist
- Figure 15. Product Picture of g/i-Line
- Figure 16. Product Picture of Others
- Figure 17. Global IC Photoresist Sales Market Share by Type in 2026
- Figure 18. Global IC Photoresist Revenue Market Share by Type (2021-2026)
- Figure 19. Product Picture of Positive Photoresists
- Figure 20. Product Picture of Negative Photoresists
- Figure 21. Global IC Photoresist Sales Market Share by Imaging Mechanism in 2026
- Figure 22. Global IC Photoresist Revenue Market Share by Imaging Mechanism (2021-2026)
- Figure 23. Product Picture of High End / Advanced 110nm
- Figure 26. Product Picture of DRAM and NAND
- Figure 27. Global IC Photoresist Sales Market Share by Process Node in 2026
- Figure 28. Global IC Photoresist Revenue Market Share by Process Node (2021-2026)
- Figure 29. IC Photoresist Consumed in IC Manufacturing
- Figure 30. Global IC Photoresist Market: IC Manufacturing (2021-2026) & (K Gallon)
- Figure 31. IC Photoresist Consumed in Advanced Packaging
- Figure 32. Global IC Photoresist Market: Advanced Packaging (2021-2026) & (K Gallon)
- Figure 33. Global IC Photoresist Sale Market Share by Application (2025)
- Figure 34. Global IC Photoresist Revenue Market Share by Application in 2026
- Figure 35. IC Photoresist Sales by Company in 2026 (K Gallon)
- Figure 36. Global IC Photoresist Sales Market Share by Company in 2026

- Figure 37. IC Photoresist Revenue by Company in 2026 (\$ millions)
- Figure 38. Global IC Photoresist Revenue Market Share by Company in 2026
- Figure 39. Global IC Photoresist Sales Market Share by Geographic Region (2021-2026)
- Figure 40. Global IC Photoresist Revenue Market Share by Geographic Region in 2026
- Figure 41. Americas IC Photoresist Sales 2021-2026 (K Gallon)
- Figure 42. Americas IC Photoresist Revenue 2021-2026 (\$ millions)
- Figure 43. APAC IC Photoresist Sales 2021-2026 (K Gallon)
- Figure 44. APAC IC Photoresist Revenue 2021-2026 (\$ millions)
- Figure 45. Europe IC Photoresist Sales 2021-2026 (K Gallon)
- Figure 46. Europe IC Photoresist Revenue 2021-2026 (\$ millions)
- Figure 47. Middle East & Africa IC Photoresist Sales 2021-2026 (K Gallon)
- Figure 48. Middle East & Africa IC Photoresist Revenue 2021-2026 (\$ millions)
- Figure 49. Americas IC Photoresist Sales Market Share by Country in 2026
- Figure 50. Americas IC Photoresist Revenue Market Share by Country (2021-2026)
- Figure 51. Americas IC Photoresist Sales Market Share by Type (2021-2026)
- Figure 52. Americas IC Photoresist Sales Market Share by Application (2021-2026)
- Figure 53. United States IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 54. Canada IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 55. Mexico IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 56. Brazil IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 57. APAC IC Photoresist Sales Market Share by Region in 2026
- Figure 58. APAC IC Photoresist Revenue Market Share by Region (2021-2026)
- Figure 59. APAC IC Photoresist Sales Market Share by Type (2021-2026)
- Figure 60. APAC IC Photoresist Sales Market Share by Application (2021-2026)
- Figure 61. China IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 62. Japan IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 63. South Korea IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Southeast Asia IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 65. India IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 66. Australia IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 67. China Taiwan IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 68. Europe IC Photoresist Sales Market Share by Country in 2026
- Figure 69. Europe IC Photoresist Revenue Market Share by Country (2021-2026)
- Figure 70. Europe IC Photoresist Sales Market Share by Type (2021-2026)
- Figure 71. Europe IC Photoresist Sales Market Share by Application (2021-2026)
- Figure 72. Germany IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 73. France IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 74. UK IC Photoresist Revenue Growth 2021-2026 (\$ millions)

- Figure 75. Italy IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 76. Russia IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 77. Middle East & Africa IC Photoresist Sales Market Share by Country (2021-2026)
- Figure 78. Middle East & Africa IC Photoresist Sales Market Share by Type (2021-2026)
- Figure 79. Middle East & Africa IC Photoresist Sales Market Share by Application (2021-2026)
- Figure 80. Egypt IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 81. South Africa IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 82. Israel IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 83. Turkey IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 84. GCC Countries IC Photoresist Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Manufacturing Cost Structure Analysis of IC Photoresist in 2026
- Figure 86. Manufacturing Process Analysis of IC Photoresist
- Figure 87. Industry Chain Structure of IC Photoresist
- Figure 88. Channels of Distribution
- Figure 89. Global IC Photoresist Sales Market Forecast by Region (2027-2032)
- Figure 90. Global IC Photoresist Revenue Market Share Forecast by Region (2027-2032)
- Figure 91. Global IC Photoresist Sales Market Share Forecast by Type (2027-2032)
- Figure 92. Global IC Photoresist Revenue Market Share Forecast by Type (2027-2032)
- Figure 93. Global IC Photoresist Sales Market Share Forecast by Application (2027-2032)
- Figure 94. Global IC Photoresist Revenue Market Share Forecast by Application (2027-2032)

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