

Global Photoresist Ancillary Materials Market Growth 2026-2032

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Abstracts

The global Photoresist Ancillary Materials market size is predicted to grow from US\$ 2303 million in 2025 to US\$ 3883 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Photoresist Ancillary Materials are high-purity electronic process materials used directly with photoresists in semiconductor lithography. They support surface preparation, resist coating, edge bead removal, development, rinsing, stripping, residue removal, reflectivity control, interface management and multilayer pattern transfer on wafers and advanced packaging substrates. The product scope includes developers, photoresist thinners, edge bead removers, rinse and pre-wet solutions, photoresist strippers and removers, HMDS adhesion promoters, BARC, TARC, topcoat, SOC, SiARC and other ancillary materials directly tied to the photoresist process window. Key performance requirements include metal ion control, particle control, residue control, coating uniformity, volatility control, material compatibility, low defectivity and batch-to-batch consistency.

Photoresist Ancillary Materials represent a critical process-material category positioned between photoresists and wet electronic chemicals. Their value is not defined purely by consumption volume, but by their impact on lithography process windows, defectivity, pattern fidelity, edge cleanliness, residue removal and compatibility with downstream etch, plating and packaging processes. Under the narrow scope used in this report, the market excludes photoresists, PAGs, resins, generic solvents and display/PCB-only materials, and focuses on developers, strippers, thinners, edge bead removers, rinse solutions, HMDS, BARC, topcoat, SOC and SiARC used directly with photoresists in semiconductor wafer fabrication and advanced packaging.

From a supply perspective, high-end Photoresist Ancillary Materials remain led by Japanese, U.S. and European suppliers. TOK, FUJIFILM, Qnity, JSR, Merck, Brewer Science, Nissan Chemical and Kanto Chemical have strong positions due to long-term customer qualification, broad product portfolios and deep process know-how. South Korean and Taiwanese suppliers are more regionally tied to memory, display, foundry and packaging supply chains, while Chinese suppliers are accelerating localization in developers, strippers, EBR, HMDS, SOC and BARC. However, Chinese suppliers still vary significantly in product grade, batch stability, customer qualification and advanced-node compatibility.

Demand growth is driven by both wafer fabrication and advanced packaging. Wafer fabs remain the largest demand base, supported by logic foundry, DRAM, 3D NAND, power devices, sensors and mature-node ICs. Advanced packaging is becoming a higher-growth segment, as RDL, bumping, TSV, fan-out, 2.5D/3D packaging and glass substrate processes require thick-resist development, high-selectivity stripping, low-corrosion cleaning and large-area uniformity. Compared with front-end advanced lithography, advanced packaging has lower resolution requirements but higher sensitivity to thick-film removal, metal compatibility, cost and panel-level yield.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Photoresist Ancillary Materials and breaks down the forecast By Product Function, By End-use 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 Photoresist Ancillary Materials.

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

Segmentation By Product Function:

- Developer (TMAH, etc)
- Edge Bead Remover & Thinner
- Rinse & Pre-wet Solution
- Photoresist Stripper/Remover
- Adhesion Promoter/Primer/HMDS
- Anti-reflective Coating (BARC & TARC)
- SOC/SiARC/Underlayer
- Other Ancillary Materials

Segmentation By Lithography Platform:

- i-line/g-line Ancillaries
- KrF Ancillaries
- ArF Dry Ancillaries
- ArF Immersion Ancillaries
- EUV Ancillaries

Advanced Packaging Lithography Ancillaries

Segmentation By Chemical System:

Aqueous Alkaline System

Solvent-based System

Amine/DMSO/NMP-free Stripper System

Spin-on Polymer Coating System

Silazane/Silane Primer System

Customized Formulation

Segmentation By End-use Application:

Logic/Foundry

DRAM

3D NAND

Analog/Power/Discrete

MEMS/Sensors

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 (Tok)

FUJIFILM Electronic Materials

Qnity Electronics

JSR Corporation

Brewer Science

Merck KGaA

Nissan Chemical

Kanto Chemical

Dongjin Semichem

Entegris

Mitsubishi Gas Chemical

Avantor

Technic Inc.

Samsung SDI

Nippon Kayaku

Shin-Etsu Chemical

ENF Technology

Chang Chun Group

YCCHEM

Kayaku Advanced Materials

Soulbrain

Allresist

KemLab

Nagase ChemteX Corporation

Solexir Technology

Xiamen Hengkun New Material Technology

Jiangyin Jianghua Microelectronics

Anji Microelectronics

Jiangsu Aisen Semiconductor Material

Shanghai Sinyang

Crystal Clear Electronic Material

Red Avenue / Kempur

Jiangsu Nata Opto-electronic Material

Daxin Materials

PhiChem Corporation

Jiangyin Runma

Xinyaqiang Silicon Chemistry

Asia Union Electronic Chemical Corporation

Zhejiang Sorbo Chemical

Key Questions Addressed in this Report

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

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

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

How do Photoresist Ancillary Materials market opportunities vary by end market size?

How does Photoresist Ancillary Materials break out By Product Function, By End-use Application?

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