

# Global Photoresist and Photoresist Ancillaries Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global Photoresist and Photoresist Ancillaries market size is predicted to grow from US\$ 5230 million in 2025 to US\$ 7804 million in 2032; it is expected to grow at a CAGR of 6.1% from 2026 to 2032.

Semiconductor photoresists and photoresist ancillary materials are core electronic chemicals used in lithography and pattern-transfer processes for integrated circuits, advanced packaging, MEMS, CMOS image sensors, compound semiconductors and other micro- and nano-fabrication applications. Photoresists form transferable patterns on wafers or packaging substrates through coating, exposure, post-exposure bake and development, serving as etch masks, electroplating molds, lift-off layers and microstructure-forming materials. Photoresist ancillary materials support development, resist stripping, dilution, edge bead removal, reflectivity control, multilayer pattern transfer, adhesion enhancement, rinsing, surface protection and defect control. The product scope covers g-line, i-line, KrF, ArF dry, ArF immersion, EUV, e-beam and thick-film positive or negative photoresists, as well as developers, strippers, removers, thinners, edge bead removers, anti-reflective coatings, BARCs, TARCs, topcoats, underlayers, spin-on carbon, spin-on glass, rinses, HMDS and other lithography process-supporting materials.

The market for semiconductor photoresists and photoresist ancillary materials should be structured first around two primary segments: Photoresist and Photoresist Ancillaries. Photoresists are the pattern-forming materials that define resolution, critical-dimension control, pattern fidelity, etch resistance and electroplating mold performance. Photoresist ancillaries support the lithography process chain through development, stripping, dilution, edge bead removal, reflectivity control, underlayer pattern transfer, rinsing, surface protection and defect reduction. The two segments are tightly linked in

fab and packaging process recipes, particularly in ArF immersion, EUV, multipatterning, advanced packaging thick-film resist and MEMS thick-structure applications.

The global competitive structure is concentrated around Japanese, US, Korean and European suppliers. Japanese companies hold the strongest position in advanced IC photoresists, with TOK, JSR, Shin-Etsu, FUJIFILM and Sumitomo Chemical covering multiple product generations from mature g-line and i-line materials to KrF, ArF, EUV and advanced-packaging thick-film resists. US-linked suppliers such as DuPont, Inpria, Brewer Science and Kayaku Advanced Materials are important across photoresists, EUV metal oxide resist, anti-reflective coatings, underlayers and MEMS specialty materials. Korea's Dongjin Semichem has built a meaningful position across photoresist, thinner, BARC and SOC materials, while Merck/EMD, micro resist technology and Allresist represent Europe's presence in AZ legacy materials, specialty resists and micro- and nanofabrication chemistries.

Demand growth is driven by advanced logic, DRAM/HBM, 3D NAND, advanced packaging, CMOS image sensors and compound semiconductors. EUV and future High-NA EUV lithography increase requirements for stochastic defect control, line-edge roughness reduction, sensitivity, etch resistance and new resist chemistries such as metal oxide resist. ArF immersion remains essential for advanced logic and memory multipatterning, while KrF, i-line and thick-film resists continue to serve mature nodes, power devices, MEMS and packaging. In advanced packaging, RDL, bumping, WLCSP, fan-out and TSV processes support demand for thick positive and negative resists, developers, strippers and edge bead removers.

Industry dynamics increasingly reflect supply-chain security, regional capacity allocation and localization. DuPont has expanded semiconductor photoresist capacity at its Sasakami site in Japan, Sumitomo Chemical is expanding evaluation and development facilities for ArF and i-line thick-film photoresists, TOK has strengthened its specialty lithography materials footprint through micro resist technology, and JSR/Inpria continues to develop EUV metal oxide resist technology. Chinese suppliers are advancing in KrF, i-line, ArF validation, advanced packaging resists and lithography ancillaries, but stable mass production for advanced ArF immersion and EUV-grade materials remains constrained by purification, defectivity, formulation control and customer qualification.

LPI (LP Information)' newest research report, the 'Photoresist and Photoresist Ancillaries Industry Forecast' looks at past sales and reviews total world Photoresist

and Photoresist Ancillaries sales in 2025, providing a comprehensive analysis by region and market sector of projected Photoresist and Photoresist Ancillaries sales for 2026 through 2032. With Photoresist and Photoresist Ancillaries sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Photoresist and Photoresist Ancillaries industry.

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

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

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

#### Segmentation by Type:

Photoresist

Photoresist Ancillaries

#### Segmentation By Photoresist Ancillary Function:

g-line Photoresist

i-line Photoresist

KrF Photoresist

ArF Dry Photoresist

ArF Immersion Photoresist

EUV Photoresist

E-beam Photoresist

Advanced Packaging Thick-film Photoresist

MEMS / Specialty Photoresist

#### Segmentation by Application:

IC Front-end

Advanced Packaging

MEMS and Sensors

CMOS Image Sensors

Compound Semiconductors

Photomask and E-beam Lithography

Other Microfabrication

#### 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 analyzing the company's coverage, product portfolio, its market penetration.

TOKYO OHKA KOGYO CO., LTD. (TOK)

JSR

Shin-Etsu Chemical

Qnity

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

Samsung SDI

Hubei Dinglong Holding

Lam Research

Tianjin Jiuri New Material

Brewer Science

Nissan Chemical

Honeywell

Toray

HD Microsystems

Asahi Kasei

Sumitomo Bakelite

Bomi Technology Co., Ltd

Desert Silicon, Inc.

Zeon

Xinyaqiang Silicon Chemistry

Anji Microelectronics Technology

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