

# **Photoresist & Photoresist Ancillaries Market by Photoresist Type (ArF Immersion, ArF Dry Film, KrF, G-line & I-line), Ancillary Type (Anti-reflective Coating, Remover, Developer), Application (Semiconductor & IC, LCD, ), Region - Global Forecast to 2028**

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## **Abstracts**

The photoresist and photoresist ancillaries market is projected to grow from USD 4.1 billion in 2023 to USD 5.3 billion by 2028, at a CAGR of 5.1% during the forecast period. The growing demand for consumer electronics, such as smartphones, tablets, wearables, and IoT devices, technological advancements in the semiconductor industry, such as the development of smaller feature sizes, new lithographic techniques (such as EUV lithography), and the integration of advanced materials, drive the need for innovative photoresists and ancillaries.

By Type, G-line segment projected to have highest CAGR during the forecast period

G-line photoresist is a type of photoresist that responds to G-line ultraviolet (UV) light with a wavelength around 436 nanometers. One advantage of G-line photoresist is its cost-effectiveness compared to newer, more advanced formulations. Additionally, G-line photoresists are compatible with older lithography equipment that utilizes G-line UV light sources. This compatibility allows for leveraging existing equipment without the need for extensive upgrades or modifications. Owing to these properties these resists are the fastest-growing photoresist segment by type in the overall photoresist and photoresist ancillaries market.

Anti-reflective coatings are projected to have the highest growth in photoresist ancillaries in the overall photoresist and photoresist ancillaries market.

Anti-reflective coatings (ARCs) are frequently employed alongside photoresists to optimize lithographic processes. These coatings effectively reduce undesirable light reflections from the substrate's surface, resulting in improved pattern resolution and decreased process variation. By integrating ARCs with photoresists, the overall lithographic performance is enhanced, facilitating highly accurate patterning and increased process yields during the manufacturing of advanced microelectronics and semiconductor devices. Anti-reflective coatings are projected to account for the highest CAGR during the forecast period.

Asia Pacific is projected to account for the highest CAGR in the photoresist and photoresist ancillaries market during the forecast period

Asia Pacific is the global manufacturing hub for semiconductors and electronic devices, with countries like China, Japan, South Korea, and Taiwan leading the way. The region's strong semiconductor industry growth is driven by factors such as increasing disposable incomes, widespread adoption of smart devices, and expanding digital infrastructure. The Asia Pacific photoresist and photoresist ancillaries market is also witnessing growth propelled by factors such as rapid urbanization and robust economic growth. The region's focus on quality, manufacturing scale, and technology plays a significant role in driving the growth of the photoresist and photoresist ancillaries market in Asia Pacific.

By Company: Tier1: 40%, Tier 2: 25%, Tier3: 4: 35%

By Designation: C-Level: 35%, Director Level: 30%, Others: 35%

By Region: North America: 25%, Asia Pacific: 45%, Europe: 20%, Middle East & Africa: 5%. South America: 5%

Companies Covered: Tokyo Ohka Kogyo Co., Ltd (Japan), JSR Corporation (Japan), Shin-Etsu Chemical Co., Ltd (Japan), Fujifilm Corporation (Japan), Sumitomo Chemical Co., Ltd. (Japan) and others are covered in the photoresist and photoresist ancillaries market.

## Research Coverage

The market study covers the photoresist and photoresist ancillaries market across various segments. It aims at estimating the market size and the growth potential of this

market across different segments based on photoresist type, photoresist ancillary type, application, and region. The study also includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their position in the photoresist and photoresist ancillaries market.

### Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the closest approximations of the revenue numbers of the overall photoresist and photoresist ancillaries market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (semiconductor industry growth and technological advancements), restraints (regulations associated with the environment), opportunities (upcoming technologies such as AI and IoT), and challenges (constantly changing market dynamics) influencing the growth of the photoresist and photoresist ancillaries market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the photoresist and photoresist ancillaries market

Market Development: Comprehensive information about lucrative markets – the report analyses the photoresist and photoresist ancillaries market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the photoresist and photoresist ancillaries market

Competitive Assessment: In-depth assessment of market shares, growth

strategies and service offerings of leading players like Tokyo Ohka Kogyo Co., Ltd (Japan), JSR Corporation (Japan), Shin-Etsu Chemical Co., Ltd (Japan), Fujifilm Corporation (Japan), Sumitomo Chemical Co., Ltd. (Japan) and among others in the photoresist and photoresist ancillaries market. The report also helps stakeholders understand the pulse of the photoresist and photoresist ancillaries market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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## About

The report "Photoresist Market by Photoresist Type (Arf Immersion, Arf Dry, KrF, I-Line, G-Line), Photoresist Ancillaries Type (Anti-Reflective Coatings, Remover, Developer), Application, and Region - Global Forecast to 2022", The global photoresist including photoresist ancillaries market was valued at USD 3.01 Billion in 2016 and is projected to reach USD 4.15 Billion by 2022, at a CAGR of 5.5% from 2017 to 2022. The market is driven by increase in demand for photoresist from various application segments, such as semiconductors & ICs, LCDs, printed circuit boards, and for other applications, such as, MEMs, NEMs, and sensors.

### **Major companies profiled in this report include:**

ALLRESIST GmbH (Germany), Avantor Performance Materials, LLC (U.S.), The Dow Chemical Company (U.S.), E.I. Du Pont de Nemours (U.S.), Fujifilm Electronics Materials Co., Ltd. (Japan), JSR Corporation (Japan), TOKYO OHKA KOGYO Co., LTD. (Japan), Sumitomo Chemicals Co., Ltd. (Japan), Merck AZ Electronics Materials (Germany), and Microchemicals GmbH (Germany). among others.

Extensive primary interviews were conducted to determine and verify the market size for several segments and subsegments gathered through secondary research.

### **The break-up of primary interviews is given below.**

By Company Type: Tier 1 – 30%, Tier 2 – 43%, and Others – 27%

By Designation: C Level – 21%, Manager Level – 30%, and Others – 49%

By Region: North America – 30%, Europe – 18%, Asia-Pacific – 41%, Middle East & Africa – 6%, and South America – 5%

## **Research Coverage**

This research report categorizes the global photoresist including photoresist ancillaries market on the basis of photoresist type, photoresist ancillaries type, application, and region. The report includes detailed information regarding major factors influencing the growth of the global photoresist market, such as drivers, restraints, challenges, and

opportunities. A detailed analysis of key industry players has been done to provide insights on business overviews, products & services, key strategies, investments & expansions, mergers & acquisitions, and other recent developments associated with the market.

### **Semiconductors & ICs is estimated to be the largest application segment of the global photoresist market**

Among applications, the semiconductors & ICs segment is estimated to lead the global photoresist market during the forecast period. Photoresist is used in the electronics industry, particularly in semiconductors & ICs, and printed circuit board designs. ICs are used in a large number of electronics devices, including smartphones, mobile devices, PCs & laptops, tablets, and advanced gaming devices. Photoresist is a thin layer used to transfer a circuit pattern to the semiconductor substrate, which it is deposited upon. The increase in demand for wearable devices and consumer electronics act as key growth drivers for photoresist market.

### **Based on type, the ArF immersion is projected to be the fastest-growing segment of the global photoresist market**

The ArF immersion technology is widely used in Large Scale Integration (LSI) circuits. The narrow wavelength of ArF light source and increased refractive index due to immersion assist photoresist users in meeting their needs of miniaturizing products with improved performance. The demand for ArF immersion photoresist is growing due to its unique properties, such as narrow wavelength, which prevents spreading of light.

Asia-Pacific accounted for the largest share of the global photoresist market in 2016. Currently, Taiwan is the largest market for photoresist in the Asia-Pacific region and is expected to continue its dominance during the forecast period. In China and Japan, the demand for photoresist is expected to increase due to the growing electronics industry and rapid economic expansion. In addition, population growth in these countries serves as a huge customer base for the manufacturers of photoresist.



## I would like to order

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