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PCB & Advanced Packaging Chemicals Market Forecasts to 2032 - Global Analysis By Chemical Type (Photoresists, Electroplating Chemicals, Etching Chemicals, Solder Mask Chemicals, Cleaning & Stripping Chemicals, and Dielectric & Insulating Materials), Packaging Type, Process, Technology, End User, and By Geography

https://marketpublishers.com/r/P110371AFC6FEN.html
Date: January 2026
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: P110371AFC6FEN

Abstracts

According to Stratistics MRC, the Global PCB & Advanced Packaging Chemicals Market is accounted for $33.2 billion in 2025 and is expected to reach $51.0 billion by 2032 growing at a CAGR of 6.3% during the forecast period. PCB & Advanced Packaging Chemicals are materials essential for fabricating printed circuit boards and semiconductor packaging. They include photoresists, etchants, plating chemicals, solder masks, underfills, and encapsulants. These chemicals enable miniaturization, high?density interconnects, and reliable performance in electronics. Advanced packaging solutions, such as fan?out wafer?level and 3D stacking, rely on precise chemical formulations for adhesion, insulation, and thermal management. They ensure electrical integrity, mechanical stability, and protection against environmental stresses.

Market Dynamics:

Driver:

Miniaturization of high-density electronic devices

The market is primarily driven by the miniaturization of high-density electronic devices, fueled by the demand for smaller, faster, and more efficient consumer electronics and

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computing systems. Advanced semiconductor and packaging technologies require precise chemical solutions to meet performance and reliability standards. Increasing adoption of wearable devices, IoT, and high-performance computing accelerates the need for innovative chemical materials. These factors collectively propel the development and integration of specialized PCB and packaging chemicals across multiple high-tech industries.

Restraint:

Stringent semiconductor-grade quality standards

Market growth is restrained by stringent semiconductor-grade quality standards, which impose rigorous requirements on chemical purity, consistency, and performance. Compliance with these standards increases manufacturing complexity and operational costs. Any deviation in quality can result in product failure or reduced device reliability. Furthermore, certification and testing processes are time-consuming and resource-intensive. These regulatory and technical barriers slow adoption rates and pose challenges for smaller suppliers seeking entry into the highly specialized PCB and packaging chemicals market.

Opportunity:

Advanced packaging for AI processors

Opportunities exist in advanced packaging for AI processors, driven by the need for efficient heat dissipation, high-speed interconnects, and miniaturized form factors. Increasing AI, machine learning, and data center applications create demand for cutting-edge packaging solutions. Collaborations between chemical manufacturers and semiconductor companies enable innovative materials development. Growing interest in 3D packaging, chiplets, and heterogeneous integration further expands the market potential. These trends offer significant avenues for revenue growth and technological advancement within the PCB and advanced packaging chemicals sector.

Threat:

Supply chain disruptions in chemicals

The market faces threats from supply chain disruptions in chemicals, which can affect production schedules and material availability. Dependence on specialized raw

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materials and geopolitical instability can increase costs and limit access. Fluctuating prices and transportation delays exacerbate operational risks. Additionally, competition from alternative materials or new chemical innovations could reduce market share. These factors collectively create uncertainty for manufacturers and end users, challenging market stability and necessitating robust supply chain strategies to mitigate potential disruptions in the PCB and packaging chemicals market.

Covid-19 Impact:

The Covid-19 pandemic disrupted global supply chains, manufacturing operations, and logistics for PCB and advanced packaging chemicals. Production halts affected semiconductor fabrication and delayed deliveries of critical materials. However, rising demand for remote work, data centers, and consumer electronics accelerated the adoption of high-density and high-performance packaging solutions. Governments and industry players implemented recovery measures, such as supply chain diversification and localized production. Overall, while short-term setbacks occurred, the pandemic highlighted the critical importance of resilient chemical supply chains for electronics manufacturing.

The photoresists segment is expected to be the largest during the forecast period

The photoresists segment is expected to account for the largest market share during the forecast period, resulting from widespread usage in photolithography processes essential for semiconductor and PCB fabrication. High precision, resolution, and chemical stability make photoresists critical for producing fine patterns on wafers and substrates. Rising demand for miniaturized devices and high-density circuits further strengthens adoption. Continuous advancements in resist formulations, including deep ultraviolet (DUV) and extreme ultraviolet (EUV) variants, enhance performance. These factors reinforce the segment?s dominant position within the PCB and advanced packaging chemicals market.

The surface mount technology (SMT) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the surface mount technology (SMT) segment is predicted to witness the highest growth rate, propelled by growing adoption of automated assembly, compact designs, and high-speed electronics. SMT chemicals facilitate soldering, fluxing, and adhesion processes for precise, reliable component placement. Increasing demand from consumer electronics, automotive electronics, and industrial automation

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drives segment growth. Technological advancements in SMT materials, including lead-free and environmentally friendly options, enhance performance. Consequently, this segment emerges as a high-growth area within PCB and advanced packaging chemicals.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to the concentration of semiconductor fabrication, PCB manufacturing, and electronics assembly hubs in China, Japan, South Korea, and Taiwan. High adoption of consumer electronics, IoT devices, and industrial automation fuels chemical demand. Well-established supply chains and investments in R&D enhance regional capabilities. Government initiatives supporting semiconductor and electronics production further consolidate Asia Pacific?s market leadership, making it the dominant region for PCB and advanced packaging chemicals.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with growing adoption of AI processors, high-performance computing, and advanced electronics. Investments in semiconductor R&D, packaging innovations, and localized chemical production accelerate market growth. Strong collaboration between technology firms, chemical manufacturers, and research institutions supports innovative packaging solutions. Rising demand for data centers, electric vehicles, and aerospace electronics further drives expansion. These factors position North America as a rapidly growing market with significant potential in PCB and advanced packaging chemicals.

Key players in the market

Some of the key players in PCB & Advanced Packaging Chemicals Market include DuPont de Nemours, Inc., BASF SE, Dow Inc., Atotech (MKS Instruments), MacDermid Alpha Electronics Solutions, Entegris, Inc., JCU Corporation, Hitachi Chemical (Showa Denko), Rohm and Haas Electronic Materials, Mitsubishi Chemical Group, Shin-Etsu Chemical Co., Ltd., JSR Corporation, TOKYO OHKA KOGYO CO., LTD., AGC Inc., Merck KGaA, Sumitomo Bakelite Co., Ltd., Henkel AG & Co. KGaA, and Kanto Chemical Co., Inc.

Key Developments:

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In November 2025, Rohm and Haas Electronic Materials unveiled advanced photoresists and etchants for semiconductor packaging. The company emphasized precision, durability, and sustainability, reinforcing its leadership in advanced packaging chemicals.

In October 2025, Hitachi Chemical (Showa Denko) launched new encapsulants and dielectric materials for advanced packaging. The company emphasized durability, sustainability, and innovation, strengthening its role in PCB and semiconductor chemicals.

In February 2025, JSR Corporation unveiled new photoresists and lithography materials for advanced packaging. The company emphasized precision, durability, and sustainability, strengthening its role in PCB and semiconductor chemicals.

Chemical Types Covered:

- Photoresists
- Electroplating Chemicals
- Etching Chemicals
- Solder Mask Chemicals
- Cleaning & Stripping Chemicals
- Dielectric & Insulating Materials

Packaging Types Covered:

- Surface Mount Technology (SMT)
- Through-Hole Technology
- Flip Chip Packaging
- Chip Scale Packaging (CSP)

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System-in-Package (SiP)

3D IC Packaging

Processes Covered:

Imaging & Patterning

Plating & Deposition

Etching & Cleaning

Surface Finishing

Encapsulation & Protection

Technologies Covered:

Conventional Packaging

Advanced Packaging

Fan-Out Packaging

Heterogeneous Integration

End Users Covered:

Electronics Manufacturing Services (EMS)

Semiconductor Foundries

Original Equipment Manufacturers (OEMs)

Automotive Manufacturers

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- Aerospace & Defense
- Healthcare Device Manufacturers

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia

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New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends

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- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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