



Global and China Photoresist Industry Report, 2017-2021

Mar.2017

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

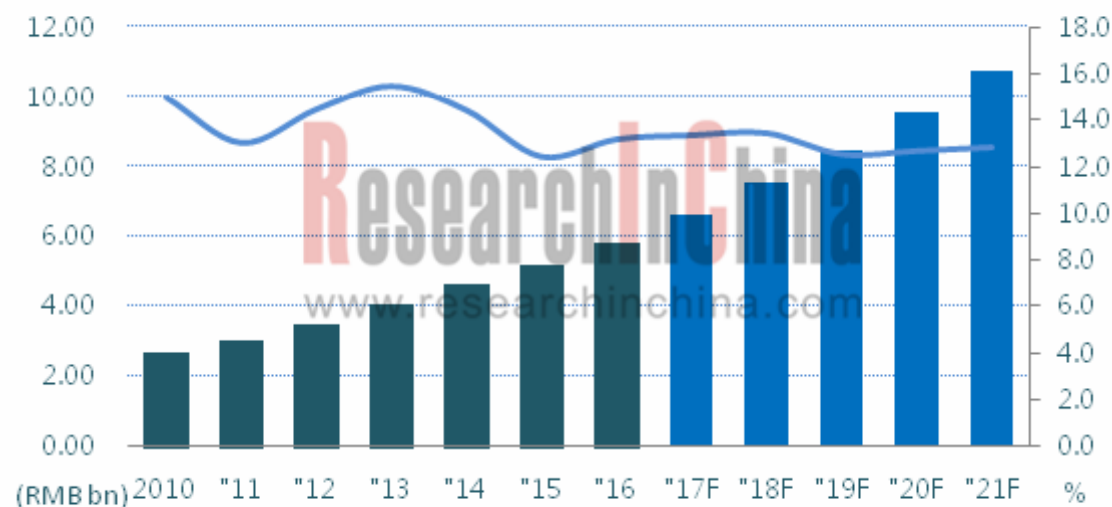
Abstract

Photoresist, a key basic material for electronic information industry, is widely used in production and processing of PCB, flat-panel display, and semiconductor IC.

Driven by growth in demand from downstream industries, global photoresist market size has maintained an AAGR of 5.8% since 2010, exceeding USD7.5 billion in 2016 and expected to surpass USD10 billion in 2021.

Japan, the United States, and Germany supplied more than 60% of the world's photoresists in 2016. The photoresist industry in China, a late starter, now booms with a market size of about RMB5.85 billion in 2016 which is predicted to double in 2021 compared with the 2016 level.

Chinese Photoresist Market Size and YoY Growth, 2010-2021E



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Globally, photoresists are primarily divided into PCB photoresist, LCD photoresist, and semiconductor photoresist by application. By contrast, photoresist is primarily consumed in PCB field in China, while TFT-LCD/semiconductor photoresists are largely imported due to higher technical barriers.

Global photoresist market is virtually monopolized by JSR, TOK, Dow Chemical (acquired by Rohm & Haas in 2009), Fujifilm, Shin-Etsu Chemical, Dongjin Semichem, and Eternal Materials, with JSR and TOK holding a combined 50% or so of the global photoresist market. The Chinese photoresist market is controlled by foreign companies. PCB photoresist is chiefly supplied by the China-based plants established by foreign companies, mostly Japanese/South Korean/Taiwanese ones; TFT-LCD photoresist is mainly provided by TOK, Dow Chemical, Dongjin Semichem, and Everlight Chemical; semiconductor photoresist is still at the stage of R&D and trial production locally, with representative firms including Kempur Microelectronics, Suzhou Ruihong Electronic Chemical, Weifang Suntific Microelectronic Materials, etc.

To improve the level of photoresist localization and reduce heavy dependence on imports, Kempur Microelectronics, Institute of Chemistry Chinese Academy of Sciences, and other companies discussed and made the roadmap for photoresist in China (2015-2020) in 2014. Thanks to this, the level of photoresist localization is expected to exceed 30% in 2021.

Global and China Photoresist Industry Report, 2017-2021 highlights the following:

- ◆ Global photoresist market size, competitive landscape, development in major regions;
- ◆ Chinese photoresist market size, supply & demand, competitive landscape, and development potential;
- ◆ PCB photoresist, LCD photoresist, and semiconductor photoresist (application status, market size, major producers);
- ◆ 14 global and 7 Chinese enterprises (operation and photoresist business).

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