

Global and China Photoresist Industry Report, 2019-2025

July 2019

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.

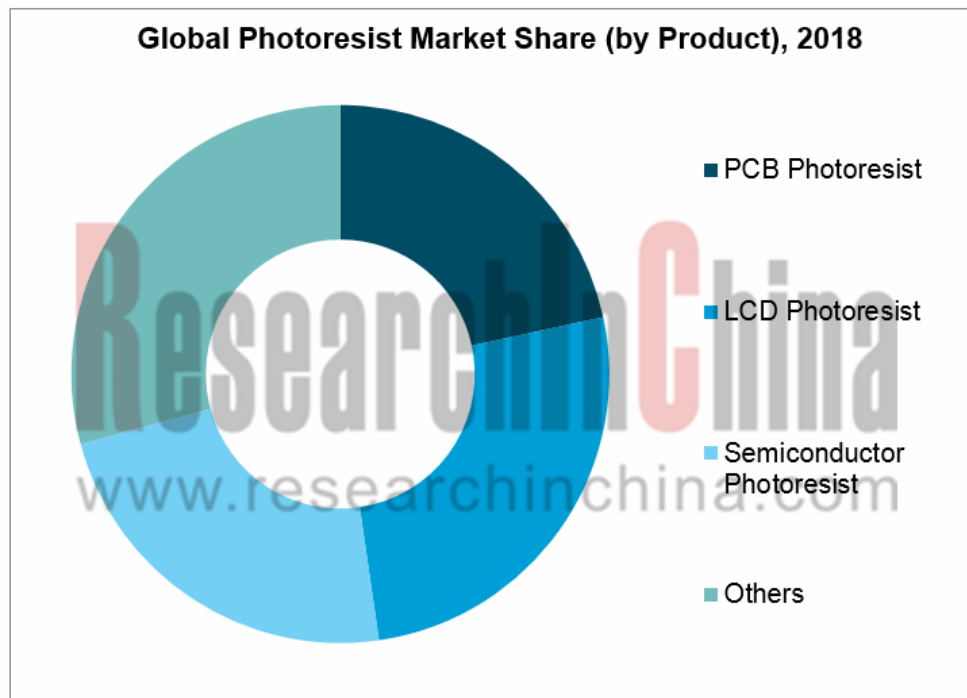
Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

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

Abstract

Photoresist, a sort of material indispensable to PCB, flat panel display, optoelectronic devices, among others, keeps expanding in market size amid the robust demand from downstream sectors. In 2018, the global photoresist market was worth approximately \$8.7 billion with a year-on-year increase of 5.7%, of which the photoresist for PCB, LCD and semiconductor commanded a combined 70.8% share.



Source: ResearchInChina

Copyright 2012ResearchInChina

Nowadays, the world's photoresist market is firmly monopolized by multinational giants such as JSR, TOK, DOW, Fujifilm, Shin-Etsu Chemical, Dongjin Semichem, Merk, and Eternal Materials. In particular, the four players including JSR, TOK, DOW and Fujifilm held over 70% market shares together in 2018.

The developed nations, namely Japan, Germany and the United States take a lion's share at least 60% of global photoresist market, leaving China far behind. Although with a growing market, China's photoresist is still heavily dependent on imports. In 2018, Chinese photoresist market was sized around RMB7.28 billion as a percentage of 12.1% in global total.

In this case, local Chinese companies are vigorously developing photoresist products so as to substitute for imports, and the leading ones are composed of Kempur Microelectronics Inc., Shenzhen Rongda Photosensitive Science & Technology Co., Ltd., Shanghai Phichem Material Co., Ltd., Jiangsu Kuangshun Photosensitivity New-Material Stock Co., Ltd., Zhejiang Yongtai Technology Co., Ltd., and New East New Materials Co., Ltd.

The four kinds of high-end photoresist now prevail in the Chinese market, including g-line, i-line, KrF, and ArF, where g-line and i-line have been spawned with deliveries being on a rise; KrF has already passed certification but is still at a critical stage; and ArF photoresist is hopeful to make a breakthrough and go through certification in 2020.

Global and China Photoresist Industry Report, 2019-2025 highlights the following:

Global photoresist industry (market size, competitive landscape, major countries and regions);

Chinese photoresist industry (market size, supply & demand, import & export, competitive pattern, etc.);

Analysis on markets of PCB photoresist, LCD photoresist and semiconductor photoresist;

14 global and 10 Chinese photoresist vendors (operation, photoresist business, etc.).

PCB/LCD Photoresist Capacity of Local Chinese Photoresist Vendors, 2018

Company	Production Capacity
Shenzhen Rongda Photosensitive Science & Technology Co., Ltd.	With the existing photosensitive ink capacity 8,000 t/a; the 1,000 t/a photoresist and ancillary chemicals manufacturing line was built at the end of 2018 mainly for flat panel display and LED chip.
Shanghai Phichem Material Co., Ltd.	With the existing PCB photoresist capacity 3,500 t/a, the 5,000 t/a TFT photoresist capacity under construction
Jiangsu Kuangshun Photosensitivity New-Material Stock Co., Ltd.	With the existing photosensitive ink capacity 6,300 t/a; an addition of 8,000 t/a is put into production in 2019.
Zhejiang Yongtai Technology Co., Ltd.	The 1,500 t/a CF photoresist project has entered the project acceptance stage; the pilot line for 150 t/a CF photoresist has been built, capable of meeting tests of mass-production samples and small supplies.
New East New Materials Co., Ltd.	With the existing capacity of electronic ink 500 tons; 5,000 tons of PCB electronic ink under construction
Beijing Asahi Electronic Materials Co., Ltd. (BAE)	TFT positive photoresist production of 1,500 t/a
CEC Xianyang CaiHong Optoelectronics Technology Co., Ltd. (CEC CHOT)	TFT positive photoresist production of 1,800 t/a
Jiangsu Brivan Electronic Technology Co., Ltd.	TFT black photoresist production of 1,000 t/a
Kempur Microelectronics Inc.	In 2005, it built the hundred-ton cyclized rubber ultraviolet negative photoresist & kiloton negative photoresist mating reagent production line; in May 2009 it built the top-grade g-line and i-line positive photoresist manufacturing line (500 t/a) and positive photoresist mating reagent manufacturing line (1,000 t/a); in December 2012, the company finished construction of 248nm photoresist production line with the capacity of 10 t/a.

Source: ResearchInChina

Copyright 2012ResearchInChina

1 Overview of Photoresist

1.1 Concepts

1.1.1 Photoresist

1.1.2 Specialty Chemicals for Photoresist

1.2 Process Flow

1.3 Industry Chain

2 Global Photoresist Market

2.1 Market Size

2.2 Competitive Landscape

2.3 Major Countries/Regions

2.3.1 Japan

2.3.2 United States

2.3.3 Germany

3 Chinese Photoresist Market

3.1 Overview

3.1.1 Development History

3.1.2 Market Size

3.1.3 Localization Level

3.2 Supply and Demand

3.2.1 Output

3.2.2 Demand

3.2.3 Import & Export

3.3 Competitive Pattern

3.3.1 Corporate Competition

3.3.2 Regional Competition

3.4 Development Potential

4 PCB Photoresist

4.1 PCB Market

4.1.1 Market Size

4.1.2 Industry Chain

4.2 PCB Photoresist

4.2.1 Market Size

4.2.2 Key Companies

5 LCD Photoresist

5.1 LCD

5.1.1 Market Size

5.1.2 Industry Chain

5.2 LCD Photoresist

5.2.1 Market Status

5.2.2 CF Photoresist

5.3 Key Companies

6 Semiconductor Photoresist

6.1 Semiconductor Market

6.1.1 Market Size

6.1.2 Industry Chain

6.2 Semiconductor Photoresist

6.2.1 Overview

6.2.2 Market Size

6.2.3 Key Companies

7 Key Global Photoresist Companies

7.1 Tokyo Ohka Kogyo

7.1.1 Profile

7.1.2 Operation

7.1.3 Photoresist Business

7.2 JSR

7.2.1 Profile

7.2.2 Operation

7.2.3 Photoresist Business

7.3 Shin-Etsu Chemical

7.3.1 Profile

7.3.2 Operation

7.3.3 Photoresist Business

7.4 Dow Chemical

7.4.1 Profile

7.4.2 Operation

7.4.3 Photoresist Business

7.5 Fujifilm

7.5.1 Profile

7.5.2 Operation

7.5.3 Photoresist Business

7.6 Sumitomo Chemical

7.6.1 Profile

7.6.2 Operation

7.6.3 Photoresist Business

7.7 Merck

7.7.1 Profile

7.7.2 Operation

7.7.3 Photoresist Business

7.8 Eternal Materials

7.8.1 Profile

7.8.2 Operation

7.8.3 Photoresist Business

7.9 Dongjin Semichem

7.9.1 Profile

7.9.2 Photoresist Business

7.10 Kumho Petrochemical

7.10.1 Profile

7.10.2 Operation

7.10.3 Photoresist Business

7.11 Everlight Chemical

7.11.1 Profile

7.11.2 Operation

7.11.3 Photoresist Business

7.12 Hitachi Chemical

- 7.12.1 Profile
- 7.12.2 Operation
- 7.12.3 Photoresist Business
- 7.13 AsahiKasei
- 7.13.1 Profile
- 7.13.2 Operation
- 7.13.3 Photoresist Business
- 7.14 Chimei
- 7.14.1 Profile
- 7.14.2 Photoresist Business

8 Key Chinese Photoresist Companies

- 8.1 Changzhou Tronly New Electronic Materials Co., Ltd.
- 8.1.1 Profile
- 8.1.2 Operation
- 8.1.3 Photoresist Business
- 8.1.4 Development Strategy
- 8.2 Zhejiang Yongtai Technology Co., Ltd.
- 8.2.1 Profile
- 8.2.2 Operation
- 8.2.3 Photoresist Business
- 8.3 Shanghai PhiChem Material Co., Ltd.
- 8.3.1 Profile
- 8.3.2 Operation
- 8.3.3 Photoresist Business

- 8.4 Kempur Microelectronics Inc.
- 8.4.1 Profile
- 8.4.2 Photoresist Business
- 8.5 Suzhou Crystal Clear Chemical Co., Ltd (SCCC)
- 8.5.1 Profile
- 8.5.2 Operation
- 8.5.3 Suzhou Ruihong Electronic Chemical Co., Ltd.
- 8.6 Shenzhen RongDa Photosensitive Science & Technology Co., Ltd.
- 8.6.1 Profile
- 8.6.2 Operation
- 8.6.3 Photoresist Business
- 8.7 Others
- 8.7.1 Weifang Suntific Microelectronic Materials Co., Ltd.
- 8.7.2 Beijing Asahi Electronic Materials Co., Ltd. (BAE)
- 8.7.3 Xuzhou B&C Chemical Co., Ltd.
- 8.7.4 Shanghai Sinyang Semiconductor Materials Co., Ltd.



Components of Photoresist
Categories and Applications of Photoresist
Composition and Functions of Photoresist-use Chemicals
Photoresist Process
Photoresist Industry Chain
Global Photoresist Market Size, 2010-2025E
Global Photoresist Market Size (by Product), 2015-2018
Global Photoresist Market Size (by Region), 2015-2025E
Distribution of Global Major Photoresist Manufacturers (by Region)
Market Share of Global Photoresist Manufacturers, 2018
Material Mass-production and R&D of Global Photoresist Manufacturers
Photoresist Market Size in Japan, 2010-2025E
Photoresist Market Size in the United States, 2010-2025E
Photoresist Market Size in Germany, 2010-2025E
Evolution of Photoresist Product and Technology Roadmaps
Policies on the Photoresist Industry in China
Photoresist Market Size and YoY Growth in China, 2010-2025E
Photoresist Market Size (by Field) in China, 2016
Status Quo of Photoresist Localization in China
China's Photoresist Technology Roadmap, 2015-2020E
China's Photoresist Output and YoY Growth, 2010-2025E
China's Photoresist Demand and YoY Growth, 2010-2025E
China's Photosensitive Emulsion Import and Export, 2012-2018
Top 10 Destinations of Photosensitive Emulsion Exports from China, 2017-2018
Top 10 Origins of Photosensitive Emulsion Imports in China, 2017-2018



China's Photoresist Import and Export Volume, 2010-2018
Competitive Pattern of Chinese Photoresist Market, 2018
Local Chinese Photoresist Manufacturers
Capacity of PCB/LCD Photoresist of Local Chinese Photoresist Manufacturers, 2018
Base Distribution of Global Major Photoresist Manufacturers in China, by the end of 2018
Number of China's Photoresist Patent Applications (by Enterprise Nature), 2016
Distribution of China's Photoresist Consumption Areas, 2018
China's Potential Photoresist Market Size (by Product), 2018-2025
Global PCB Output Value, 2011-2025E
Global PCB Output Value (by Product Type), 2014-2025E
Global PCB Output Value (by Region), 2014-2025E
Mainland China's PCB Output Value, 2011-2025E
PCB Industry Chain
PCB Production Process
Major Categories and Products of PCB Chemicals
Global PCB Photoresist Market Size, 2010-2025E
China's Import and Export of PCB-use Dry Film Photoresist, 2017-2019
Global Major PCB Photoresist Manufacturers
Layout of Global Major PCB Photoresist Manufacturers in China
Development Stages of Display Technologies
Global Large-sized TFF-LCD Panel Shipment and YoY Growth, 2013-2025E
Global Large-sized TFF-LCD Panel Shipment (by Application), 2010-2018
Global OLED Market Size, 2014-2025E
Manufacturing Lines of Key Chinese LCD Companies
LCD Industry Chain



Applications of Photoresist in LCD Development / Etching Process

LCD Composition and Cost Structure

Major Suppliers of LCD Materials

Global LCD Photoresist Market Size, 2010-2025E

Color Filter (CF) Manufacturing Method

Pigment-dispersion-type Photoresist CF Manufacturing Method

Global Major OLED Photoresist Technologies

Global CF Photoresist Consumption, 2010-2025E

Major LCD Photoresist Manufacturers in the World

Global Semiconductor Market Size and YoY Growth, 2013-2025E

Top 10 Global Semiconductor Manufacturers by Revenue, 2018

Semiconductor Industry Chain

Global Semiconductor Material Sales, 2011-2025E

Global Semiconductor Material Sales (by Type), 2013-2018

Semiconductor Material Sales in Major Regions Worldwide, 2014-2018

Comparisons between the World's Top 10 Semiconductor Vendors by Revenue, 2017-2018

Photoresist as a Percentage of Semiconductor Material Market Worldwide, 2011-2025E

Role of Photoresist in Formation of Semiconductor Circuit

Major Types of Semiconductor Photoresist

Global Semiconductor Photoresist Market Size, 2010-2025E

Global Market Size of Major Semiconductor Photoresist Products, 2014-2020E

China's Semiconductor Photoresist Demand (by Product), 2016

New-type Lithography Technology

Competitive Pattern of Global Semiconductor Photoresist Enterprises, 2018

TOK's Products and Main Applications



TOK's Main Businesses and Products

Net Sales and Operating Income of TOK, FY2009-FY2017

Net Sales and Operating Income by Business of TOK, FY2016-FY2019

Quarterly Net Sales Breakdown of Material Business of TOK, FY2017-FY2018

Sales Composition of Eletronic Functional Materials by Type, FY2017-FY2019

Sales Composition of Semiconductor Photoresist by Region, FY2017-FY2019

Development History of TOK's Photoresist Business

Competitive Edges of TOK's Photoresist Business

TOK's Photoresist Production Bases and Distribution

Production Facilities Expansion Plan of TOK

Photoresist Business Development Strategy of TOK, FY2018-FY2021

JSR's Main Businesses

Product Portfolio of JSR

JSR's Net Sales and Operating Profit, FY2014-FY2019

JSR's Revenue by Business, FY2015-FY2017

JSR's Revenue Breakdown by Business Segment, FY2017

JSR i-Line Negative Type Photoresist for Thick Film Application

JSR KrF Photoresist for Implant Layer

JSR ArF Immersion Photoresist Series for Implantation Process

JSR EUV Lithography Materials


JSR's Presence in China

Global Presence of Shin-Etsu

Shin-Etsu Chemical's Main Products

Shin-Etsu Chemical's Revenue and Net Income, FY2015-FY2019

Shin-Etsu Chemical's Revenue by Segment, FY2015-FY2019



Shin-Etsu Chemical's Operating Income by Segment, FY2015-FY2019

Performance Materials & Coatings Segment

Industrial Intermediates & Infrastructure Segment

Packaging & Specialty Plastics Segment

Achievements of DOW, 2014-2018

DOW's Revenue by Business, 2016-2018

Revenue Structure of DOW's Materials & Coatings Division by Products/Regions, 2018

Distribution of DOW's Production Bases (by Business/Region), 2018

DOW's Photolithography Technique and Products

Fujifilm's Business Structure

Fujifilm's Revenue and Net Income, FY2013-FY2019

Fujifilm's Revenue by Business, FY2014-FY2019

Fujifilm's Revenue by Destination, FY2014-FY2019

Fujifilm Information Solutions' Revenue by Product, FY2014-FY2019

Sumitomo Chemical's Revenue, FY2011-FY2018

Sumitomo Chemical's Revenue by Business, FY2014-FY2018

Sumitomo Chemical's Photoresist Production Bases

Distribution of Sumitomo Chemical's Companies in China

Key Operations of Sumitomo Chemical's Affiliated Companies in China

Merck's Revenue, 2011-2019

Merck's Revenue by Business, 2015-2019

Merck's Revenue by Region, 2015-2019

AZEM's Photoresist Series Products

AZEM's Photolithography Technique

AZEM's Global Footprint



LED Processing Steps and Typical Photoresist Requirements

Technical Parameters of Merck's Photoresist Products

Eternal Materials' Revenue, 2013-2018

Eternal Materials' Revenue by Business, 2014-2018

Eternal Materials' Revenue by Region, 2017-2018

Capacity, Output and Output Value (by Products) of Eternal Materials, 2017-2018

Sales Volume and Revenue (by Products) of Eternal Materials, 2017-2018

Eternal Materials' Photoresist Products and Applications

Eternal Materials' Photoresist Production Bases

Dongjin's Global Network

Dongjin's Photoresist and Applications

Dongjin's Key Photoresist Plants

Distribution of Dongjin's Plants in China

Distribution of KKPC's Manufacturing Bases

KKPC's Major Operating Indicators, 2014-2018

KKPC's Plan for Capacity Expansion, 2018-2019

KKPC's Revenue Breakdown by Region, 2018

KKPC's Revenue Breakdown by Business, 2018

KKPC's Photoresist Products

Development History of KKPC's Photoresist and Related Products


Capacity of KKPC's Photoresist and Related Products, 2018

Key Production Bases of KKPC

Everlight Chemical's Global Network

Everlight Chemical's Revenue and Net Income, 2014-2018

Everlight Chemical's Sales Volume and Revenue by Product, 2015-2018



Revenue Structure (by Products) of Everlight Chemical, 2018	
Everlight Chemical's Sales Volume and Revenue by Region, 2017-2018	
Sales Volume of Everlight Chemical, 2018-2019	
Everlight Chemical's Photoresist Products and Applications	
Everlight Chemical's Electronic Chemicals Production Bases	
Everlight Chemical's Photoresist Production and Sales Volume, 2014-2019E	
Hitachi Chemical's Revision of organization structure	
Hitachi Chemical's Revision of the contents in the segments	
Mid-term Business Plan of Hitachi Chemical for 2021	
Development Goals of Hitachi Chemical, 2025	
Hitachi Chemical's Major Economic Indicators, FY2013-FY2018	
Hitachi Chemical's Revenue by Division, FY2013-FY2018	
Hitachi Chemical's Revenue by Region, FY2013-FY2018	
Hitachi Chemical's Functional Materials Business Revenue by Products, FY2017-FY2018	
Hitachi Chemical's Main Photoresist and Related Products	
Hitachi Chemical's Main Photoresist Production Bases	
Asahi Kasei's Revenue and Net Income, FY2011-FY2018	
Asahi Kasei's Revenue by Business, FY2017-FY2018	
Asahi Kasei's Photosensitive Dry Film Production Bases Worldwide	
CHIMEI's Photoresist Series Products	
Related Subsidiaries of Changzhou Tronly New Electronic Materials Co., Ltd.	
Revenue and Gross Margin of Changzhou Tronly New Electronic Materials, 2015-2019	
Operating Revenue and Gross Margin of Changzhou Tronly New Electronic Materials by Business, 2014-2018	
Output and Sales Volume of Major Products of Changzhou Tronly New Electronic Materials, 2016-2017	
R&D Costs and % of Total Revenue of Changzhou Tronly New Electronic Materials, 2015-2019	



Revenue and Net Income of Zhejiang Yongtai Technology, 2013-2018

Revenue Breakdown of Zhejiang Yongtai Technology by Products, 2016-2018

Revenue Structure of Zhejiang Yongtai Technology by Products, 2016-2018

Product Portfolio of Shanghai PhiChem Material

Industrial Bases of Shanghai PhiChem Material

Development Course of Shanghai PhiChem Material, 2009-2019

Revenue and Net Income of Shanghai PhiChem Material, 2013-2019

Financial Indices of Major Subsidiaries of Shanghai PhiChem Material, 2018

Operating Revenue of Shanghai PhiChem Material by Business, 2014-2016

Operating Revenue and Gross Margin of Shanghai PhiChem Material by Business, 2017-2018

Gross Margin of Shanghai PhiChem Material, 2013-2018

Progress in Investment Projects of Shanghai PhiChem Material as of 2019Q1

Capacity of Shanghai PhiChem Material, 2018

Shareholders of Kempur Microelectronics, as of end of 2018

Subsidiaries of SCCC

Revenue and Net Income of SCCC, 2015-2019

Revenue Breakdown of SCCC by Product, 2016-2018

Gross Margin of SCCC by Product, 2017-2018

Capacity, Output and Sales Volume of SCCC by Product, 2016

R&D Costs and % of Total Revenue, 2015-2018

Financial Indices of Suzhou Ruihong Electronic Chemical, 2017-2018

Photoresist Products of Suzhou Ruihong Electronic Chemical

Revenue and Net Income of Shenzhen RongDa Photosensitive Science & Technology, 2014-2019

Operating Revenue of Shenzhen RongDa Photosensitive Science & Technology by Business, 2013-2018

Output and Sales Revenue of Shenzhen RongDa Photosensitive Science & Technology by Product, 2015-2018



Gross Margin of Shenzhen RongDa Photosensitive Science & Technology by Product, 2016-2018

Major Economic Indicators for Photoresist and Related Chemicals of Shenzhen RongDa Photosensitive Science & Technology, 2013-2018

Major Economic Indicators for Photoresist Related Subsidiaries of Shenzhen RongDa Photosensitive Science & Technology, 2017-2018

Photoresist Products of Weifang Suntific Microelectronic Materials

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 2-626, 6th Floor, No.1, Shanyuan Street, Haidian District, Beijing, 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license)2,800 USD
 Hard copy 3,000 USD
 PDF (Enterprisewide license)..... 4,200 USD

✂ Reports will be dispatched immediately once full payment has been received.

Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- ❑ *Multi-users market reports*
- ❑ *Database-RICDB*
- ❑ *Custom Research*
- ❑ *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: