

**Global and China Photoresist Industry  
Report, 2020-2026**

**Jul.2020**

## 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.

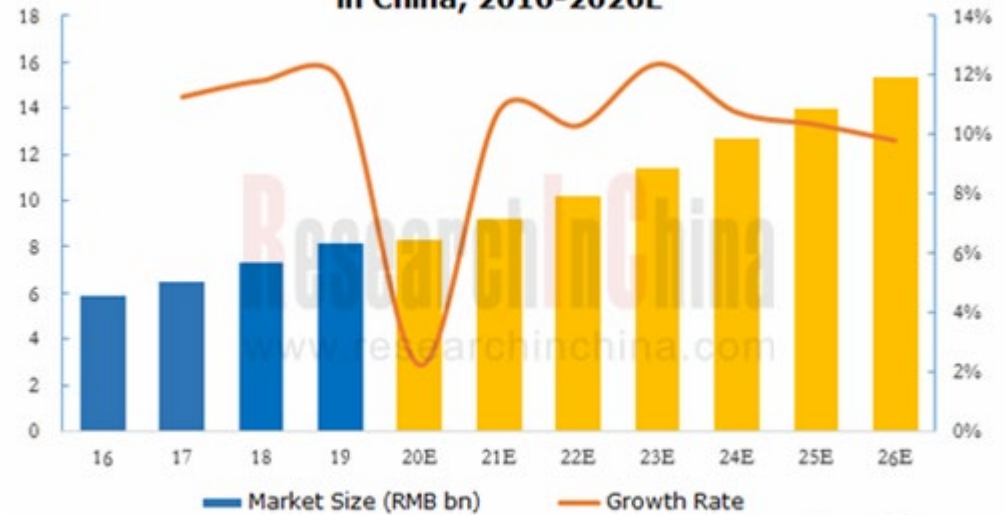
## INFORMATION SOURCES

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

## Abstract

In 2019, global photoresist market was valued at \$8.3 billion, growing at a compound annual rate of 5.1% or so since 2010, and it will outnumber \$12.7 billion in 2026 with advances in electronic technologies in automobile, AI, national defense, among others in the forthcoming years, showing CAGR of 6.3% between 2019 and 2026. In China, local photoresist supply has sustained annual growth rates of 11% since 2011, thanks to the transferring of semiconductor, display panel and PCB industries to the East. In 2019, the photoresist sales in China reached RMB8.14 billion, or virtually 14% of the global total, leaving enormous room for growth. It is conceivable that the Chinese photoresist market is ever enlarging amid migration of display panel and advanced semiconductor production to China, expectedly to RMB15.34 billion in 2026, with the CARG 9.5% during 2019-2026.

**Photoresist Market Size and Growth Rate in China, 2016-2026E**



Source: Global and China Photoresist Industry Report, 2020-2026

By application, photoresists fall into PCB, display panel, semiconductor and other types. In 2019, in global photoresist market, PCB, display panel and semiconductor segments were worth \$1,940 million, \$231 million and \$182 million, sharing 23.3%, 27.8% and 21.9% of the global total, separately. In China, PCB photoresist prevails in market, sweeping 93.5%, while those for display panel and semiconductors take a tiny share.

Global photoresist market is long monopolized by Japanese and American companies, with the top five players commanding a whopping 87% of the highly concentrated market. Four Japanese companies, JSR, Tokyo Ohka Kogyo, Shin-Etsu Chemical and Fujifilm Electronic Materials, take a combined 71% share. And the core technologies for high resolution KrF/ArF semiconductor photoresists are blockaded by companies from Japan and the US, like DuPont, JSR, Shin-Etsu Chemical, Tokyo Ohka Kogyo and Fujifilm Electronic Materials. Through the lens of the market pattern, Japan is home to photoresist giants. Chinese companies including Shenzhen Rongda Photosensitive & Technology Co., Ltd., New East New Materials Co., Ltd., Beijing Lituoda Sci-Technology Co., Ltd., Shanghai Phichem Material Co., Ltd. and Suzhou Crystal Clear Chemical Co., Ltd., win a place in PCB wet film, LCD photoresist, and LED wide g/i/h line fields; Jiangsu Yoke Technology Co., Ltd. makes a foray into CF black photoresist market by acquiring part of LG Chem's color photoresist assets. In the semiconductor photoresist field, Chinese producers focus on low-end product lines (g/l line and cyclized rubber photoresist), and KrF/ArF and extreme ultraviolet (EUV) photoresists are already in the pipeline.

Global and China Photoresist Industry Report, 2020-2026 highlights the following:

- ◆ Photoresist industry (definition and classification, industry chain, technology trends, etc.);
- ◆ Global photoresist market and markets in major countries (size, structure, regional pattern, import & export, etc.);
- ◆ China photoresist market (size, competitive pattern, import & export, etc.);
- ◆ Global and China photoresist market segments (semiconductor, PCB, LCD, etc.) (market size, competitive pattern, etc.);
- ◆ 14 global and 7 Chinese photoresist producers (operation, photoresist products and business, key projects, forecast, etc.).

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