

Global Metal and Hard Mask Etch System Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Metal and Hard Mask Etch System competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. An etch system shapes the thin film into a desired patterns using liquid chemicals, reaction gases or ion chemical reaction. An etch system is used in manufacturing lines for semiconductors and other electronic devices. This report mainly covers metal etch and hard mask etch system market. North America have a larger market share which account for nearly 70%, followed by Japan and Asia-Pacific region. The world TOP 5 players in the Metal and Hard Mask Etch System market are Lam Research, Applied Materials, Hitachi High-tech, Tokyo Electron and Oxford Instruments, which account for more than 65% of the total market share. Analysis of market driving factors

1. Technology node shrinkage and process upgrade
Demand background: As chip manufacturing processes advance to 3nm and below, traditional photoresist masks are difficult to meet the requirements of line width control (50:1).
Technology driver: Hard mask etching systems have become key supporting equipment for extreme ultraviolet lithography (EUV) and double patterning processes through high selectivity and plasma resistance.
2. Explosion of demand for 5G/AIoT and high-performance computing
Market demand: The demand for high-frequency and low-power chips in scenarios such as 5G base stations, AI accelerators, and autonomous driving has surged.
Process requirements: Copper interconnect layer: Hard mask ensures the layout accuracy of copper wires and reduces resistance and signal delay. Low dielectric constant (Low-K) materials: Hard mask protects porous ultra-low K dielectrics from plasma damage.
3. Policy support and accelerated domestic substitution
Global policy: US CHIPS Act: Invest \$52 billion to support local semiconductor manufacturing, including hard mask material research and development. EU Chip Act: The goal is to increase the share of

European chip production capacity to 20% by 2030. China's domestic substitution: policy-driven: The second phase of the National Integrated Circuit Industry Investment Fund (Big Fund) focuses on supporting the localization of etching equipment.4. Expansion of emerging application fieldsAdvanced packaging:TSV (Through Silicon Via): Hard masks are used for high-density vertical interconnection to increase the communication bandwidth between chips.Fan-Out packaging: Hard masks enable high-precision redistribution layer (RDL) etching.Third-generation semiconductors:SiC/GaN devices: Hard masks solve the problem of hard material etching and improve device withstand voltage and switching speed.5. Industry chain integration and cost optimizationVertical integration: Leading companies (such as Lam Research) cover the entire process from hard mask material development to etching equipment manufacturing, shortening the R&D cycle.Cost reduction: Optimize etching parameters (such as power, pressure, gas flow) through AI, reduce consumables consumption, and reduce the cost of single wafers.3. Market trends and prospectsTechnical direction:High-K hard mask: using materials such as HfO₂ to further reduce thickness to

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