

Global SOH (Spin on Hardmask) Competitive Landscape Professional Research Report 2025

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Abstracts

Market Overview

According to DIResearch's in-depth investigation and research, the global SOH (Spin on Hardmask) market size will reach 2,158.97 Million USD in 2025 and is projected to reach 4,049.19 Million USD by 2032, with a CAGR of 9.40% (2025-2032). Notably, the China SOH (Spin on Hardmask) market has changed rapidly in the past few years. By 2025, China's market size is expected to be Million USD, representing approximately % of the global market share.

Research Summary

Spin-on Hardmask (SOH) is a type of organic or inorganic coating material used in semiconductor manufacturing, typically applied through a spin-coating process to create a uniform thin film that serves as a hardmask layer during pattern transfer in advanced lithography. SOH materials provide excellent etch resistance and pattern fidelity, making them essential for multi-patterning techniques at sub-10nm nodes where conventional photoresists alone are insufficient. By acting as an intermediate masking layer, SOH enables precise pattern definition and depth control in complex etch stacks, contributing to improved resolution, critical dimension control, and overall process reliability in advanced integrated circuit fabrication.

The major global manufacturers of SOH (Spin on Hardmask) include Samsung SDI, JSR, Merck, DuPont, Ycchem, Shin-Etsu MicroSi, etc. The global players competition landscape in this report is divided into three tiers. The first tier comprises global leading enterprises that command a substantial market share, hold a dominant industry position, possess strong competitiveness and influence, and generate significant

revenue. The second tier includes companies with a notable market presence and reputation; these firms actively follow industry leaders in product, service, or technological innovation and maintain a moderate revenue scale. The third tier consists of smaller companies with limited market share and lower brand recognition, primarily focused on local markets and generating comparatively lower revenue.

This report studies the market size, price trends and future development prospects of SOH (Spin on Hardmask). Focus on analysing the market share, product portfolio, prices, sales, revenue and gross profit margin of global major manufacturers, as well as the market status and trends of different product types and applications in the global SOH (Spin on Hardmask) market. The report data covers historical data from 2020 to 2024, based year in 2025 and forecast data from 2026 to 2032.

The regions and countries in the report include North America, Europe, China, APAC (excl. China), Latin America and Middle East and Africa, covering the SOH (Spin on Hardmask) market conditions and future development trends of key regions and countries, combined with industry-related policies and the latest technological developments, analyze the development characteristics of SOH (Spin on Hardmask) industries in various regions and countries, help companies understand the development characteristics of each region, help companies formulate business strategies, and achieve the ultimate goal of the company's global development strategy.

The data sources of this report mainly include the National Bureau of Statistics, customs databases, industry associations, corporate financial reports, third-party databases, etc. Among them, macroeconomic data mainly comes from the National Bureau of Statistics, International Economic Research Organization; industry statistical data mainly come from industry associations; company data mainly comes from interviews, public information collection, third-party reliable databases, and price data mainly comes from various markets monitoring database.

Global Key Manufacturers of SOH (Spin on Hardmask) Include:

Samsung SDI

JSR

Merck

DuPont

Ycchem

Shin-Etsu MicroSi

SOH (Spin on Hardmask) Product Segment Include:

Spin on Hardmask (SOH)

Spin on Dielectrics (SOD)

SOH (Spin on Hardmask) Product Application Include:

Semiconductors (excl. Memory)

DRAM

NAND

Chapter Scope

Chapter 1: Product Research Range, Product Types and Applications, Market Overview, Market Situation and Trends

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