

Global SOH (Spin on Hardmasks) 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 Hardmasks) market size will reach 1,091.45 Million USD in 2025 and is projected to reach 2,183.05 Million USD by 2032, with a CAGR of 10.41% (2025-2032). Notably, the China SOH (Spin on Hardmasks) 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

SOH (Spin on Hardmasks) refers to a class of materials used in semiconductor manufacturing processes, specifically in advanced lithography techniques such as photolithography. SOH materials are applied as thin films through a spin-coating process onto a substrate, typically silicon wafers, to serve as hard masks during pattern transfer processes. Hard masks are essential in semiconductor fabrication for defining intricate patterns and structures on the wafer surface. SOH materials exhibit properties that make them suitable for high-resolution patterning and etching processes, providing excellent etch selectivity and durability compared to underlying layers. They play a crucial role in enabling the precise replication of nanoscale features required in modern integrated circuits (ICs) and microelectronics. SOH materials are carefully selected based on factors such as thermal stability, chemical resistance, compatibility with other process chemicals, and their ability to maintain critical dimensions during manufacturing.

The major global manufacturers of SOH (Spin on Hardmasks) include Samsung SDI,

Merck Group, JSR, Nissan Chemical Industries, Shin-Etsu MicroSi, YCCHEM, 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 Hardmasks). 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 Hardmasks) 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 Hardmasks) 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 Hardmasks) 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 Hardmasks) Include:

Samsung SDI

Merck Group

JSR

Nissan Chemical Industries

Shin-Etsu MicroSi

YCCHEM

SOH (Spin on Hardmasks) Product Segment Include:

Spin on Carbon Hardmasks (SOC)

Spin on Metal Oxide Hardmasks (MHM)

Others

SOH (Spin on Hardmasks) Product Application Include:

Semiconductors (excl. Memory)

DRAM

NAND

LCDs

Chapter Scope

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

Chapter 2: Global SOH (Spin on Hardmasks) Industry PESTEL Analysis

Chapter 3: Global SOH (Spin on Hardmasks) Industry Porter's Five Forces Analysis

Chapter 4: Global SOH (Spin on Hardmasks) Major Regional Market Size (Revenue, Sales, Price) and Forecast Analysis

Chapter 5: Global SOH (Spin on Hardmasks) Market Size and Forecast by Type and Application Analysis

Chapter 6: North America SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 7: Europe SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 8: China SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 9: APAC (Excl. China) SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 10: Latin America SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 11: Middle East and Africa SOH (Spin on Hardmasks) Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 12: Global SOH (Spin on Hardmasks) Competitive Analysis of Key Manufacturers (Sales, Revenue, Market Share, Price, Regional Distribution and Industry Concentration)

Chapter 13: Key Company Profiles (Product Portfolio, Sales, Revenue, Price and Gross Margin)

Chapter 14: Industrial Chain Analysis, Include Raw Material Suppliers, Distributors and

Customers

Chapter 15: Research Findings and Conclusion

Chapter 16: Methodology and Data Sources

Contents

1 SOH (SPIN ON HARDMASKS) MARKET OVERVIEW

- 1.1 Product Definition and Statistical Scope
- 1.2 SOH (Spin on Hardmasks) Product by Type
 - 1.2.1 Spin on Carbon Hardmasks (SOC)
 - 1.2.2 Spin on Metal Oxide Hardmasks (MHM)
 - 1.2.3 Others
- 1.3 SOH (Spin on Hardmasks) Product by Application
 - 1.3.1 Semiconductors (excl. Memory)
 - 1.3.2 DRAM
 - 1.3.3 NAND
 - 1.3.4 LCDs
- 1.4 Global SOH (Spin on Hardmasks) Market Revenue and Sales Analysis
 - 1.4.1 Global SOH (Spin on Hardmasks) Revenue Market Size Analysis (2020-2032)
 - 1.4.2 Global SOH (Spin on Hardmasks) Sales Market Size Analysis (2020-2032)
 - 1.4.3 Global SOH (Spin on Hardmasks) Market Sales Price Trend Analysis (2020-2032)
- 1.5 SOH (Spin on Hardmasks) Industry Trends and Innovation
 - 1.5.1 SOH (Spin on Hardmasks) Industry Trends and Innovation
 - 1.5.2 SOH (Spin on Hardmasks) Market Drivers and Challenges

2 SOH (SPIN ON HARDMASKS) MARKET PESTEL ANALYSIS

- 2.1 Political Factors Analysis
- 2.2 Economic Factors Analysis
- 2.3 Social Factors Analysis
- 2.4 Technological Factors Analysis
- 2.5 Environmental Factors Analysis
- 2.6 Legal Factors Analysis

3 SOH (SPIN ON HARDMASKS) MARKET PORTER'S FIVE FORCES ANALYSIS

- 3.1 Competitive Rivalry
- 3.2 Threat of New Entrants
- 3.3 Bargaining Power of Suppliers
- 3.4 Bargaining Power of Buyers
- 3.5 Threat of Substitutes

4 GLOBAL SOH (SPIN ON HARDMASKS) MARKET ANALYSIS BY REGIONS

4.1 Global SOH (Spin on Hardmasks) Overall Market: 2024 VS 2025 VS 2032

4.2 Global SOH (Spin on Hardmasks) Revenue and Forecast Analysis (2020-2032)

4.2.1 Global SOH (Spin on Hardmasks) Revenue and Market Share by Region (2020-2025)

4.2.2 Global SOH (Spin on Hardmasks) Revenue and Market Share Forecast by Region (2026-2032)

4.3 Global SOH (Spin on Hardmasks) Sales and Forecast Analysis (2020-2032)

4.3.1 Global SOH (Spin on Hardmasks) Sales and Market Share by Region (2020-2025)

4.3.2 Global SOH (Spin on Hardmasks) Sales and Market Share Forecast by Region (2026-2032)

4.4 Global SOH (Spin on Hardmasks) Sales Price Trend Analysis (2020-2032)

5 GLOBAL SOH (SPIN ON HARDMASKS) MARKET SIZE BY TYPE AND APPLICATION

5.1 Global SOH (Spin on Hardmasks) Market Size by Type

5.1.1 Global SOH (Spin on Hardmasks) Revenue and Forecast Analysis by Type (2020-2032)

5.1.2 Global SOH (Spin on Hardmasks) Sales and Forecast Analysis by Type (2020-2032)

5.2 Global SOH (Spin on Hardmasks) Market Size by Application

5.2.1 Global SOH (Spin on Hardmasks) Revenue and Forecast Analysis by Application (2020-2032)

5.2.2 Global SOH (Spin on Hardmasks) Sales and Forecast Analysis by Application (2020-2032)

6 NORTH AMERICA

6.1 North America SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)

6.2 North America Key Manufacturers Analysis

6.3 North America SOH (Spin on Hardmasks) Market Size by Type

6.3.1 North America SOH (Spin on Hardmasks) Sales by Type (2020-2032)

6.3.2 North America SOH (Spin on Hardmasks) Revenue by Type (2020-2032)

6.4 North America SOH (Spin on Hardmasks) Market Size by Application

- 6.4.1 North America SOH (Spin on Hardmasks) Sales by Application (2020-2032)
- 6.4.2 North America SOH (Spin on Hardmasks) Revenue by Application (2020-2032)
- 6.5 North America SOH (Spin on Hardmasks) Market Size by Country
 - 6.5.1 US
 - 6.5.2 Canada

7 EUROPE

- 7.1 Europe SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)
- 7.2 Europe Key Manufacturers Analysis
- 7.3 Europe SOH (Spin on Hardmasks) Market Size by Type
 - 7.3.1 Europe SOH (Spin on Hardmasks) Sales by Type (2020-2032)
 - 7.3.2 Europe SOH (Spin on Hardmasks) Revenue by Type (2020-2032)
- 7.4 Europe SOH (Spin on Hardmasks) Market Size by Application
 - 7.4.1 Europe SOH (Spin on Hardmasks) Sales by Application (2020-2032)
 - 7.4.2 Europe SOH (Spin on Hardmasks) Revenue by Application (2020-2032)
- 7.5 Europe SOH (Spin on Hardmasks) Market Size by Country
 - 7.5.1 Germany
 - 7.5.2 France
 - 7.5.3 United Kingdom
 - 7.5.4 Italy
 - 7.5.5 Spain
 - 7.5.6 Benelux

8 CHINA

- 8.1 China SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)
- 8.2 China Key Manufacturers Analysis
- 8.3 China SOH (Spin on Hardmasks) Market Size by Type
 - 8.3.1 China SOH (Spin on Hardmasks) Sales by Type (2020-2032)
 - 8.3.2 China SOH (Spin on Hardmasks) Revenue by Type (2020-2032)
- 8.4 China SOH (Spin on Hardmasks) Market Size by Application
 - 8.4.1 China SOH (Spin on Hardmasks) Sales by Application (2020-2032)
 - 8.4.2 China SOH (Spin on Hardmasks) Revenue by Application (2020-2032)

9 APAC (EXCL. CHINA)

9.1 APAC (excl. China) SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)

9.2 APAC (excl. China) Key Manufacturers Analysis

9.3 APAC (excl. China) SOH (Spin on Hardmasks) Market Size by Type

9.3.1 APAC (excl. China) SOH (Spin on Hardmasks) Sales by Type (2020-2032)

9.3.2 APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Type (2020-2032)

9.4 APAC (excl. China) SOH (Spin on Hardmasks) Market Size by Application

9.4.1 APAC (excl. China) SOH (Spin on Hardmasks) Sales by Application (2020-2032)

9.4.2 APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Application (2020-2032)

9.5 APAC (excl. China) SOH (Spin on Hardmasks) Market Size by Country

9.5.1 Japan

9.5.2 South Korea

9.5.3 India

9.5.4 Australia

9.5.5 Southeast Asia

10 LATIN AMERICA

10.1 Latin America SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)

10.2 Latin America Key Manufacturers Analysis

10.3 Latin America SOH (Spin on Hardmasks) Market Size by Type

10.3.1 Latin America SOH (Spin on Hardmasks) Sales by Type (2020-2032)

10.3.2 Latin America SOH (Spin on Hardmasks) Revenue by Type (2020-2032)

10.4 Latin America SOH (Spin on Hardmasks) Market Size by Application

10.4.1 Latin America SOH (Spin on Hardmasks) Sales by Application (2020-2032)

10.4.2 Latin America SOH (Spin on Hardmasks) Revenue by Application (2020-2032)

10.5 Latin America SOH (Spin on Hardmasks) Market Size by Country

10.6 Latin America SOH (Spin on Hardmasks) Market Size by Country

10.6.1 Mexico

10.6.2 Brazil

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa SOH (Spin on Hardmasks) Market Size and Growth Rate Analysis (2020-2032)

11.2 Middle East & Africa Key Manufacturers Analysis

11.3 Middle East & Africa SOH (Spin on Hardmasks) Market Size by Type

- 11.3.1 Middle East & Africa SOH (Spin on Hardmasks) Sales by Type (2020-2032)
- 11.3.2 Middle East & Africa SOH (Spin on Hardmasks) Revenue by Type (2020-2032)
- 11.4 Middle East & Africa SOH (Spin on Hardmasks) Market Size by Application
 - 11.4.1 Middle East & Africa SOH (Spin on Hardmasks) Sales by Application (2020-2032)
 - 11.4.2 Middle East & Africa SOH (Spin on Hardmasks) Revenue by Application (2020-2032)
- 11.5 Middle East SOH (Spin on Hardmasks) Market Size by Country
 - 11.5.1 Saudi Arabia
 - 11.5.2 South Africa

12 COMPETITION BY MANUFACTURERS

- 12.1 Global SOH (Spin on Hardmasks) Market Sales, Revenue and Price by Key Manufacturers (2021-2025)
 - 12.1.1 Global SOH (Spin on Hardmasks) Market Sales by Key Manufacturers (2021-2025)
 - 12.1.2 Global SOH (Spin on Hardmasks) Market Revenue by Key Manufacturers (2021-2025)
 - 12.1.3 Global SOH (Spin on Hardmasks) Average Sales Price by Manufacturers (2021-2025)
- 12.2 SOH (Spin on Hardmasks) Competitive Landscape Analysis and Market Dynamic
 - 12.2.1 SOH (Spin on Hardmasks) Competitive Landscape Analysis
 - 12.2.2 Global Key Manufacturers Headquarter Location and Key Area Sales
 - 12.2.3 Market Dynamic

13 KEY COMPANIES ANALYSIS

- 13.1 Samsung SDI
 - 13.1.1 Samsung SDI Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
 - 13.1.2 Samsung SDI SOH (Spin on Hardmasks) Product Portfolio
 - 13.1.3 Samsung SDI SOH (Spin on Hardmasks) Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)
- 13.2 Merck Group
 - 13.2.1 Merck Group Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
 - 13.2.2 Merck Group SOH (Spin on Hardmasks) Product Portfolio
 - 13.2.3 Merck Group SOH (Spin on Hardmasks) Market Data Analysis (Revenue,

Sales, Price, Gross Margin and Market Share) (2021-2025)

13.3 JSR

13.3.1 JSR Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.3.2 JSR SOH (Spin on Hardmasks) Product Portfolio

13.3.3 JSR SOH (Spin on Hardmasks) Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

13.4 Nissan Chemical Industries

13.4.1 Nissan Chemical Industries Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.4.2 Nissan Chemical Industries SOH (Spin on Hardmasks) Product Portfolio

13.4.3 Nissan Chemical Industries SOH (Spin on Hardmasks) Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

13.5 Shin-Etsu MicroSi

13.5.1 Shin-Etsu MicroSi Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.5.2 Shin-Etsu MicroSi SOH (Spin on Hardmasks) Product Portfolio

13.5.3 Shin-Etsu MicroSi SOH (Spin on Hardmasks) Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

13.6 YCCHEM

13.6.1 YCCHEM Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.6.2 YCCHEM SOH (Spin on Hardmasks) Product Portfolio

13.6.3 YCCHEM SOH (Spin on Hardmasks) Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

14 INDUSTRY CHAIN ANALYSIS

14.1 SOH (Spin on Hardmasks) Industry Chain Analysis

14.2 SOH (Spin on Hardmasks) Industry Raw Material and Suppliers Analysis

14.2.1 SOH (Spin on Hardmasks) Key Raw Material Supply Analysis

14.2.2 Raw Material Suppliers and Contact Information

14.3 SOH (Spin on Hardmasks) Typical Downstream Customers

14.4 SOH (Spin on Hardmasks) Sales Channel Analysis

15 RESEARCH FINDINGS AND CONCLUSION

16 METHODOLOGY AND DATA SOURCE

16.1 Methodology/Research Approach

16.2 Research Scope

16.3 Benchmarks and Assumptions

16.4 Date Source

16.4.1 Primary Sources

16.4.2 Secondary Sources

16.5 Data Cross Validation

16.6 Disclaimer

List Of Tables

LIST OF TABLES

Table 1: Global SOH (Spin on Hardmasks) Market Size Growth Rate by Type, 2024 VS 2025 VS 2032 (US\$ Million)

Table 2: Global SOH (Spin on Hardmasks) Market Size Growth Rate by Application, 2024 VS 2025 VS 2032 (US\$ Million)

Table 3: SOH (Spin on Hardmasks) Industry Development Status

Table 4: SOH (Spin on Hardmasks) Industry Development Trends

Table 5: Global SOH (Spin on Hardmasks) Market Size by Region in US\$ Million: 2024 VS 2025 VS 2032

Table 6: Global SOH (Spin on Hardmasks) Revenue by Region (2020-2025) & (US\$ Million)

Table 7: Global SOH (Spin on Hardmasks) Revenue Market Share by Region (2020-2025)

Table 8: Global SOH (Spin on Hardmasks) Revenue Forecast by Region (2026-2032) & (US\$ Million)

Table 9: Global SOH (Spin on Hardmasks) Revenue Market Share Forecast by Region (2026-2032)

Table 10: Global SOH (Spin on Hardmasks) Sales by Region (2020-2025) & (Cubic Meter)

Table 11: Global SOH (Spin on Hardmasks) Sales Market Share by Region (2020-2025)

Table 12: Global SOH (Spin on Hardmasks) Sales Forecast by Region (2026-2032) & (Cubic Meter)

Table 13: Global SOH (Spin on Hardmasks) Sales Market Share Forecast by Region (2026-2032)

Table 14: Global SOH (Spin on Hardmasks) Revenue Analysis by Type (2020-2025) & (US\$ Million)

Table 15: Global SOH (Spin on Hardmasks) Revenue Analysis Forecast by Type (2026-2032) & (US\$ Million)

Table 16: Global SOH (Spin on Hardmasks) Sales Analysis by Type (2020-2025) & (Cubic Meter)

Table 17: Global SOH (Spin on Hardmasks) Sales Analysis Forecast by Type (2026-2032) & (Cubic Meter)

Table 18: Global SOH (Spin on Hardmasks) Revenue Analysis by Application (2020-2025) & (US\$ Million)

Table 19: Global SOH (Spin on Hardmasks) Revenue Analysis Forecast by Application

(2026-2032) & (US\$ Million)

Table 20: Global SOH (Spin on Hardmasks) Sales Analysis by Application (2020-2025) & (Cubic Meter)

Table 21: Global SOH (Spin on Hardmasks) Sales Analysis Forecast by Application (2026-2032) & (Cubic Meter)

Table 22: Key SOH (Spin on Hardmasks) Players in North America

Table 23: North America SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 24: North America SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 25: North America SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 26: North America SOH (Spin on Hardmasks) Revenue by Type (2026-2032) & (US\$ Million)

Table 27: North America SOH (Spin on Hardmasks) Sales by Application (2020-2025) & (Cubic Meter)

Table 28: North America SOH (Spin on Hardmasks) Sales by Application (2026-2032) & (Cubic Meter)

Table 29: North America SOH (Spin on Hardmasks) Revenue by Application (2020-2025) & (US\$ Million)

Table 30: North America SOH (Spin on Hardmasks) Revenue by Application (2026-2032) & (US\$ Million)

Table 31: North America SOH (Spin on Hardmasks) Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 32: North America SOH (Spin on Hardmasks) Revenue Market Size by Country (2026-2032) & (US\$ Million)

Table 33: North America SOH (Spin on Hardmasks) Sales Market Size by Country (2020-2025) & (Cubic Meter)

Table 34: North America SOH (Spin on Hardmasks) Sales Market Size by Country (2026-2032) & (Cubic Meter)

Table 35: Key SOH (Spin on Hardmasks) Players in Europe

Table 36: Europe SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 37: Europe SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 38: Europe SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 39: Europe SOH (Spin on Hardmasks) Revenue by Type (2026-2032) & (US\$ Million)

Table 40: Europe SOH (Spin on Hardmasks) Sales by Application (2020-2025) & (Cubic Meter)

Table 41: Europe SOH (Spin on Hardmasks) Sales by Application (2026-2032) & (Cubic Meter)

Table 42: Europe SOH (Spin on Hardmasks) Revenue by Application (2020-2025) & (US\$ Million)

Table 43: Europe SOH (Spin on Hardmasks) Revenue by Application (2026-2032) & (US\$ Million)

Table 44: Europe SOH (Spin on Hardmasks) Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 45: Europe SOH (Spin on Hardmasks) Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 46: Europe SOH (Spin on Hardmasks) Sales Market Size by Country (2020-2025) & (Cubic Meter)

Table 47: Europe SOH (Spin on Hardmasks) Sales Market Size Forecast by Country (2026-2032) & (Cubic Meter)

Table 48: Key SOH (Spin on Hardmasks) Players in China

Table 49: China SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 50: China SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 51: China SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 52: China SOH (Spin on Hardmasks) Revenue by Type (2026-2032) & (US\$ Million)

Table 53: China SOH (Spin on Hardmasks) Sales by Application (2020-2025) & (Cubic Meter)

Table 54: China SOH (Spin on Hardmasks) Sales by Application (2026-2032) & (Cubic Meter)

Table 55: China SOH (Spin on Hardmasks) Revenue by Application (2020-2025) & (US\$ Million)

Table 56: China SOH (Spin on Hardmasks) Revenue by Application (2026-2032) & (US\$ Million)

Table 57: Key SOH (Spin on Hardmasks) Players in APAC (excl. China)

Table 58: APAC (excl. China) SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 59: APAC (excl. China) SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 60: APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 61: APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Type

(2026-2032) & (US\$ Million)

Table 62: APAC (excl. China) SOH (Spin on Hardmasks) Sales by Application

(2020-2025) & (Cubic Meter)

Table 63: APAC (excl. China) SOH (Spin on Hardmasks) Sales by Application

(2026-2032) & (Cubic Meter)

Table 64: APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Application

(2020-2025) & (US\$ Million)

Table 65: APAC (excl. China) SOH (Spin on Hardmasks) Revenue by Application

(2026-2032) & (US\$ Million)

Table 66:: APAC (excl. China) SOH (Spin on Hardmasks) Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 67: APAC (excl. China) SOH (Spin on Hardmasks) Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 68: APAC (excl. China) SOH (Spin on Hardmasks) Sales Market Size by Country (2020-2025) & (Cubic Meter)

Table 69: APAC (excl. China) SOH (Spin on Hardmasks) Sales Market Size Forecast by Country (2026-2032) & (Cubic Meter)

Table 70: Key SOH (Spin on Hardmasks) Players in Latin America

Table 71: Latin America SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 72: Latin America SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 73: Latin America SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 74: Latin America SOH (Spin on Hardmasks) Revenue by Type (2026-2032) & (US\$ Million)

Table 75: Latin America SOH (Spin on Hardmasks) Sales by Application (2020-2025) & (Cubic Meter)

Table 76: Latin America SOH (Spin on Hardmasks) Sales by Application (2026-2032) & (Cubic Meter)

Table 77: Latin America SOH (Spin on Hardmasks) Revenue by Application (2020-2025) & (US\$ Million)

Table 78: Latin America SOH (Spin on Hardmasks) Revenue by Application (2026-2032) & (US\$ Million)

Table 79: Latin America SOH (Spin on Hardmasks) Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 80: Latin America SOH (Spin on Hardmasks) Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 81: Latin America SOH (Spin on Hardmasks) Sales Market Size by Country

(2020-2025) & (Cubic Meter)

Table 82: Latin America SOH (Spin on Hardmasks) Sales Market Size Forecast by Country (2026-2032) & (Cubic Meter)

Table 83: Key SOH (Spin on Hardmasks) Players in Middle East & Africa

Table 84: Middle East & Africa SOH (Spin on Hardmasks) Sales by Type (2020-2025) & (Cubic Meter)

Table 85: Middle East & Africa SOH (Spin on Hardmasks) Sales by Type (2026-2032) & (Cubic Meter)

Table 86: Middle East & Africa SOH (Spin on Hardmasks) Revenue by Type (2020-2025) & (US\$ Million)

Table 87: Middle East & Africa SOH (Spin on Hardmasks) Revenue by Type (2026-2032) & (US\$ Million)

Table 88: Middle East & Africa SOH (Spin on Hardmasks) Sales by Application (2020-2025) & (Cubic Meter)

Table 89: Middle East & Africa SOH (Spin on Hardmasks) Sales by Application (2026-2032) & (Cubic Meter)

Table 90: Middle East & Africa SOH (Spin on Hardmasks) Revenue by Application (2020-2025) & (US\$ Million)

Table 91: Middle East & Africa SOH (Spin on Hardmasks) Revenue by Application (2026-2032) & (US\$ Million)

Table 92: Middle East & Africa SOH (Spin on Hardmasks) Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 93: Middle East & Africa SOH (Spin on Hardmasks) Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 94: Middle East & Africa SOH (Spin on Hardmasks) Sales Market Size by Country (2020-2025) & (Cubic Meter)

Table 95: Middle East & Africa SOH (Spin on Hardmasks) Sales Market Size Forecast by Country (2026-2032) & (Cubic Meter)

Table 96: Global SOH (Spin on Hardmasks) Market Sales by Key Manufacturers (2021-2025) & (Cubic Meter)

Table 97: Global SOH (Spin on Hardmasks) Sales Market Share by Key Manufacturers (2021-2025)

Table 98: Global SOH (Spin on Hardmasks) Market Revenue by Key Manufacturers (2021-2025) & (US\$ Million)

Table 99: Global SOH (Spin on Hardmasks) Revenue Market Share by Key Manufacturers (2021-2025)

Table 100: Global Average Sales Price by Manufacturers (2021-2025) & (USD/Cubic Meter)

Table 101: Global Key Manufacturers Headquarter Location and Key Area Sales

- Table 102: Market Mergers & Acquisitions, Expansion
- Table 103: Samsung SDI Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 104: Samsung SDI SOH (Spin on Hardmasks) Product Portfolio
- Table 105: Samsung SDI SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 106: Merck Group Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 107: Merck Group SOH (Spin on Hardmasks) Product Portfolio
- Table 108: Merck Group SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 109: JSR Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 110: JSR SOH (Spin on Hardmasks) Product Portfolio
- Table 111: JSR SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 112: Nissan Chemical Industries Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 113: Nissan Chemical Industries SOH (Spin on Hardmasks) Product Portfolio
- Table 114: Nissan Chemical Industries SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 115: Shin-Etsu MicroSi Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 116: Shin-Etsu MicroSi SOH (Spin on Hardmasks) Product Portfolio
- Table 117: Shin-Etsu MicroSi SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 118: YCCHEM Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
- Table 119: YCCHEM SOH (Spin on Hardmasks) Product Portfolio
- Table 120: YCCHEM SOH (Spin on Hardmasks) Revenue (US\$ Million), Sales (Cubic Meter), Price (USD/Cubic Meter), Gross Margin and Market Share (2021-2025)
- Table 121: Upstream Key Raw Material Price List
- Table 122: SOH (Spin on Hardmasks) Raw Material Suppliers and Contact Information
- Table 123: SOH (Spin on Hardmasks) Typical Customer List
- Table 124: SOH (Spin on Hardmasks) Distributors List

List Of Figures

LIST OF FIGURES

- Figure 1: SOH (Spin on Hardmasks) Product Pictures
- Figure 2: Spin on Carbon Hardmasks (SOC) Picture Scope
- Figure 3: Spin on Metal Oxide Hardmasks (MHM) Picture Scope
- Figure 4: Others Picture Scope
- Figure 5: Semiconductors (excl. Memory) Picture Scope
- Figure 6: DRAM Picture Scope
- Figure 7: NAND Picture Scope
- Figure 8: LCDs Picture Scope
- Figure 9: Global SOH (Spin on Hardmasks) Market Size Analysis: 2024 VS 2025 VS 2032 (US\$ Million)
- Figure 10: Global SOH (Spin on Hardmasks) Market Revenue and Growth Rate Analysis: (2020-2032) & (US\$ Million)
- Figure 11: Global SOH (Spin on Hardmasks) Market Sales and Growth Rate Analysis (2020-2032) & (Cubic Meter)
- Figure 12: Global SOH (Spin on Hardmasks) Market Price Trend Analysis (2020-2032) & (USD/Cubic Meter)
- Figure 13: Global SOH (Spin on Hardmasks) Market Size by Region (2020-2032) & (US\$ Million)
- Figure 14: Global SOH (Spin on Hardmasks) Market Share Scenario by Region in Percentage: 2025 Versus 2032
- Figure 15: Global SOH (Spin on Hardmasks) Sales Price by Region (2020-2032) & (Cubic Meter)
- Figure 16: North America SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)
- Figure 17: North America SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024
- Figure 18: North America SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)
- Figure 19: North America SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)
- Figure 20: North America SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)
- Figure 21: North America SOH (Spin on Hardmasks) Revenue Market Share by Application (2020-2032)
- Figure 22: US SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 23:Canada SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 24:Europe SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 25:Europe SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024

Figure 26:Europe SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)

Figure 27:Europe SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)

Figure 28:Europe SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)

Figure 29:Europe SOH (Spin on Hardmasks) Revenue Market Share by Application (2020-2032)

Figure 30:Germany SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 31:France SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 32:United Kingdom SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 33:Italy SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 34:Spain SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 35:Benelux SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 36:China SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 37:China SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024

Figure 38:China SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)

Figure 39:China SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)

Figure 40:China SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)

Figure 41:China SOH (Spin on Hardmasks) Revenue Market Share by Application (2020-2032)

Figure 42:APAC (excl. China) SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 43:APAC (excl. China) SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024

Figure 44:APAC (excl. China) SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)

Figure 45:APAC (excl. China) SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)

Figure 46:APAC (excl. China) SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)

Figure 47:APAC (excl. China) SOH (Spin on Hardmasks) Revenue Market Share by

Application (2020-2032)

Figure 48:Japan SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 49:South Korea SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 50:India SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 51:Australia SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 52:Southeast Asia SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 53:Latin America SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 54:Latin America SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024

Figure 55:Latin America SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)

Figure 56:Latin America SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)

Figure 57:Latin America SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)

Figure 58:Latin America SOH (Spin on Hardmasks) Revenue Market Share by Application (2020-2032)

Figure 59:Mexico SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 60:Brazil SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 61:Middle East & Africa SOH (Spin on Hardmasks) Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 62:Middle East & Africa SOH (Spin on Hardmasks) Revenue Market Share by Players in 2024

Figure 63:Middle East & Africa SOH (Spin on Hardmasks) Sales Market Share by Type (2020-2032)

Figure 64:Middle East & Africa SOH (Spin on Hardmasks) Revenue Market Share by Type (2020-2032)

Figure 65:Middle East & Africa SOH (Spin on Hardmasks) Sales Market Share by Application (2020-2032)

Figure 66:Middle East & Africa SOH (Spin on Hardmasks) Revenue Market Share by Application (2020-2032)

Figure 67:Saudi Arabia SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 68:South Africa SOH (Spin on Hardmasks) Revenue (2020-2032) & (US\$ Million)

Figure 69:Global SOH (Spin on Hardmasks) Sales Market Share by Key Manufacturers

in 2024

Figure 70:Global SOH (Spin on Hardmasks) Revenue Market Share by Key Manufacturers in 2024

Figure 71:Global SOH (Spin on Hardmasks) Industry Competition Landscape

Figure 72:SOH (Spin on Hardmasks) Industry Chain Analysis

Figure 73:Bottom-Up and Top-Down Research Methods

Figure 74:Key Interview Objectives

Figure 75:Data Cross Validation

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