

Global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market size was valued at US\$ 29.84 million in 2025 and is forecast to a readjusted size of US\$ 302 million by 2032 with a CAGR of 39.1% during review period.

Ultra-low dielectric loss electronic resin materials refer to a class of high-frequency electronic grade resins based on pure hydrocarbon backbone or low-polarity heteroatom-containing polymers, produced through coordination polymerization, free radical polymerization or modification processes. This research focuses on products with dielectric loss factor $D_f \leq 0.005$ and dielectric constant $D_k \leq 2.8$ for high-frequency high-speed electronic applications. Core product forms include thermosetting hydrocarbon resins, modified polyphenylene ether resins, cyclo-olefin polymers, benzocyclobutene resins, and acenaphthylene resins. Key manufacturing processes encompass BCB thermal addition polymerization, ODV copolymerization, acenaphthylene monomer synthesis, and PPE oligomer modification. These materials exhibit extremely low molecular polarity, minimal dielectric loss, high thermal stability, low moisture absorption, and excellent dimensional stability. Primary applications include AI server copper clad laminates, 5G communication base stations, advanced semiconductor packaging, millimeter wave antennas, and high-speed backplanes. The upstream segment comprises hydrocarbon monomers, catalysts and modifiers, the midstream focuses on resin polymerization and purification, while the downstream encompasses CCL manufacturing and IC substrate packaging. The global electronic grade ultra-low dielectric hydrocarbon resin industry maintains an average gross margin

of approximately 35% to 50% in 2025, and M9 grade premium products command prices of 500,000 to 700,000 US dollars per metric ton.

The global ultra-low dielectric loss electronic resin materials industry is entering a rapid expansion phase, primarily driven by accelerating AI computing demand. NVIDIA's Rubin platform has adopted M9-grade hydrocarbon resin systems as one of the key foundational materials for ultra-high-speed interconnect architectures. Resin consumption per AI server is significantly higher than that of traditional servers, and demand generated by the Rubin platform alone is already approaching or exceeding the currently effective global supply capacity, leading to a widening supply-demand gap across the industry. From a supply-side perspective, Japanese companies maintain dominant positions in modified polyphenylene ether (mPPE) and cyclo-olefin polymer (COP/COC) technologies through long-term patent accumulation, while U.S. companies continue to lead in benzocyclobutene (BCB)-based thermosetting hydrocarbon resin systems. Chinese suppliers have achieved important breakthroughs in acenaphthylene resin and ODV-based hydrocarbon resin technologies, with several domestic manufacturers reportedly entering NVIDIA-related supply chains and planning kiloton-scale production capacity expansions, accelerating the localization and import substitution process. From a technology roadmap perspective, M9-grade hydrocarbon resin systems have gradually evolved into two parallel development paths: ODV-based systems and BCB-based systems. ODV materials have become the mainstream solution for current AI server substrates and high-speed PCB applications due to their balanced electrical performance and relatively lower manufacturing cost. In contrast, BCB systems, while regarded as the industry benchmark for ultra-low dielectric loss performance, remain limited to a small number of extreme high-frequency and advanced packaging scenarios because of their high cost and processing complexity. At the policy level, multiple countries have identified high-frequency electronic materials as strategically important components of semiconductor supply chain security. China has included ultra-low loss electronic materials within its strategic emerging industries framework, while leading global manufacturers continue to expand capital expenditure in advanced resin and substrate material production. Overall, the industry is characterized by extremely high technical barriers, lengthy customer qualification cycles, and slow effective capacity ramp-up, and is therefore expected to remain in a structurally supply-constrained seller's market for an extended period.

This report is a detailed and comprehensive analysis for global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df \leq 0.0005) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition,

supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market size and forecasts, in consumption value (\$ Million), sales quantity (ton), and average selling prices (USD/ton), 2021-2032

Global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (ton), and average selling prices (USD/ton), 2021-2032

Global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (ton), and average selling prices (USD/ton), 2021-2032

Global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market shares of main players, shipments in revenue (\$ Million), sales quantity (ton), and ASP (USD/ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study

include Dow Inc., Sichuan Emi Technology Co., Ltd., Mayani New Materials (Anshan Huihong Technology Co., Ltd.), Jinan Shengquan Group Co., Ltd., Nippon Steel Chemical & Material Co., Ltd., Asahi Kasei Corporation, Sartomer (Arkema Group), Cray Valley (TotalEnergies), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Hydrocarbon Resin (ODV)

Hydrocarbon Resin (BCB)

Market segment by Dk Stability

High Stability(
Standard Stability(1-3%)

Market segment by Application

AI Computing / Hyperscale Data Center

Telecommunications (5G/6G)

Semiconductor OSAT / Foundry

Automotive Electronics (ADAS)

Consumer Electronics

Major players covered

Dow Inc.

Sichuan Emi Technology Co., Ltd.

Mayani New Materials (Anshan Huihong Technology Co., Ltd.)

Jinan Shengquan Group Co., Ltd.

Nippon Steel Chemical & Material Co., Ltd.

Asahi Kasei Corporation

Sartomer (Arkema Group)

Cray Valley (TotalEnergies)

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ?

0.0005) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005), with price, sales quantity, revenue, and global market share of Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) from 2021 to 2026.

Chapter 3, the Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005).

Chapter 14 and 15, to describe Electronic-Grade Ultra-Low Dielectric Hydrocarbon Resin(Df ? 0.0005) sales channel, distributors, customers, research findings and conclusion.

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