

Global EUV Lithography Anti-Reflective Coating Materials 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 EUV Lithography Anti-Reflective Coating Materials market size was valued at US\$ 494 million in 2025 and is forecast to a readjusted size of US\$ 1189 million by 2032 with a CAGR of 12.5% during review period.

EUV lithography anti reflective coating materials are high purity functional underlayer materials used in extreme ultraviolet lithography processes to optimize EUV exposure energy transfer, reduce substrate reflectivity, enhance pattern transfer stability, and improve linewidth control in advanced semiconductor manufacturing. These materials mainly include spin on carbon materials, organic underlayer materials, hardmask underlayer materials, multilayer pattern transfer auxiliary materials, and hybrid functional layer materials. Products are typically supplied as spin coated liquid chemical formulations manufactured through high purity polymer synthesis, ultra low metallic contamination control, specialty monomer engineering, electronic grade solvent formulation, and precision coating technologies to form nanoscale uniform thin films. Key performance specifications include EUV absorption capability, low reflectivity, etch selectivity, thermal stability, defect control performance, line edge roughness control capability, and ultra thin film uniformity. The materials are widely used in advanced logic nodes at 3nm and below, advanced DRAM, HBM memory, and High NA EUV lithography platforms. In 2025, the global EUV lithography anti reflective coating materials industry maintained relatively high profitability, with average industry gross margins generally ranging from approximately 38 percent to 58 percent. High end EUV functional underlayer materials typically carry significantly higher unit value than conventional DUV lithography auxiliary materials due to their stringent purity requirements, complex formulation systems, and long semiconductor fab qualification

cycles.

The EUV lithography anti reflective coating materials industry is transitioning from conventional ArF multiple patterning auxiliary materials toward dedicated EUV underlayer platforms designed for next generation semiconductor manufacturing. The primary growth drivers are the increasing number of EUV layers used in advanced logic devices, HBM memory, and advanced DRAM processes, together with the gradual commercialization of 2nm and High NA EUV production platforms. Compared with traditional BARC materials, next generation EUV underlayers are required not only to suppress reflectivity, but also to provide pattern support, improve etch transfer performance, minimize line edge roughness, suppress defects, and maintain thermal stability during advanced lithography processing. As a result, technical barriers have increased substantially. The upstream supply chain mainly consists of high purity polymers, electronic grade solvents, specialty monomers, and ultra clean chemical systems, while the midstream focuses on formulation development and advanced lithography auxiliary material manufacturing. Downstream demand is concentrated in advanced logic fabs, advanced memory manufacturers, and emerging High NA EUV process platforms. Continued semiconductor capital expenditure and advanced node expansion are supporting long term market growth. The global competitive landscape remains highly concentrated, with Japanese and US suppliers maintaining dominant positions due to their deep integration with leading semiconductor fabs and long established material validation capabilities. Korean suppliers are strengthening their market presence through close collaboration with domestic semiconductor manufacturers, while Chinese suppliers are still largely in the qualification and localization phase. Because EUV underlayer materials are tightly coupled with photoresist chemistry, etch integration, and pattern transfer processes, customer qualification cycles are extremely long and switching costs remain high. Leading material suppliers have accelerated investments in production expansion, new product development, and High NA EUV compatible material systems. At the same time, semiconductor supply chains are becoming increasingly regionalized, with multiple countries introducing industrial incentives, advanced manufacturing subsidies, and semiconductor localization policies aimed at improving domestic supply chain resilience and reducing dependence on overseas suppliers. Over the next several years, the industry is expected to maintain relatively strong growth momentum, although competition will increasingly shift from standalone material supply toward integrated process collaboration capability. As semiconductor manufacturing advances toward GAA transistor architectures, High NA EUV lithography, and increasingly complex multilayer patterning structures, material suppliers will face stricter requirements related to defect control, metallic impurity reduction, ultra thin film uniformity, and etch

compatibility. Research and development intensity and fab co development requirements are therefore expected to rise further. Some traditional DUV auxiliary material suppliers may encounter technology replacement pressure, while companies with advanced polymer platforms, high end formulation expertise, and long term fab validation experience are expected to strengthen their competitive positions. Overall, the EUV lithography anti reflective coating materials market remains a highly specialized semiconductor materials segment characterized by small market size, high value added content, and extremely high qualification barriers, with a favorable long term outlook.

This report is a detailed and comprehensive analysis for global EUV Lithography Anti-Reflective Coating Materials 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 EUV Lithography Anti-Reflective Coating Materials market size and forecasts, in consumption value (\$ Million), sales quantity (Kg), and average selling prices (US\$/Kg), 2021-2032

Global EUV Lithography Anti-Reflective Coating Materials market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kg), and average selling prices (US\$/Kg), 2021-2032

Global EUV Lithography Anti-Reflective Coating Materials market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kg), and average selling prices (US\$/Kg), 2021-2032

Global EUV Lithography Anti-Reflective Coating Materials market shares of main players, shipments in revenue (\$ Million), sales quantity (Kg), and ASP (US\$/Kg), 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 EUV Lithography Anti-Reflective Coating Materials

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 EUV Lithography Anti-Reflective Coating Materials 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 JSR Corporation, TOKYO OHKA KOGYO CO., LTD., Brewer Science, Inc., Shin-Etsu Chemical Co., Ltd., DuPont de Nemours, Inc., Merck KGaA, Dongjin Semichem Co., Ltd., FUJIFILM Corporation, Nissan Chemical Corporation, Sumitomo Chemical Co., Ltd., etc.

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

Market Segmentation

EUV Lithography Anti-Reflective Coating Materials 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

Absorber-type BARC

Spin-on Carbon (SOC)

Organic Underlayer

Silicon Hardmask (Si-HM)

Multilayer Patterning Auxiliary Materials

Others

Market segment by Process

Single Layer Integration

Bilayer Stack Integration

Trilayer Stack Integration

Others

Market segment by Material System

Carbon Rich Polymer System

Acrylic Polymer System

Aromatic Polymer System

Silicon Containing System

Others

Market segment by Application

Advanced Logic Devices

Advanced DRAM

HBM Memory

High NA EUV Platforms

Others

Major players covered

JSR Corporation

TOKYO OHKA KOGYO CO., LTD.

Brewer Science, Inc.

Shin-Etsu Chemical Co., Ltd.

DuPont de Nemours, Inc.

Merck KGaA

Dongjin Semichem Co., Ltd.

FUJIFILM Corporation

Nissan Chemical Corporation

Sumitomo Chemical Co., Ltd.

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 EUV Lithography Anti-Reflective Coating Materials product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of EUV Lithography Anti-Reflective Coating Materials, with price, sales quantity, revenue, and global market share of EUV Lithography Anti-Reflective Coating Materials from 2021 to 2026.

Chapter 3, the EUV Lithography Anti-Reflective Coating Materials competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the EUV Lithography Anti-Reflective Coating Materials 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 EUV Lithography Anti-Reflective Coating Materials 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 EUV Lithography Anti-Reflective Coating Materials.

Chapter 14 and 15, to describe EUV Lithography Anti-Reflective Coating Materials sales channel, distributors, customers, research findings and conclusion.

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