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Global EUV Underlayer Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global EUV Underlayer Materials market size is expected to reach $ 676 million by 2032, rising at a market growth of 17.1% CAGR during the forecast period (2026-2032).

EUV underlayer materials are functional thin films placed between EUV photoresist and the wafer substrate to improve adhesion, tune secondary-electron and energy transfer, suppress pattern collapse, reduce stochastic defects, or enhance downstream etch transfer. Platforms include organic, silicon-containing, metal-oxide, and organic-inorganic hybrid chemistries, with requirements for ultrathin uniform films, low outgassing, low metal contamination, and precise chemical compatibility with EUV resists. In 2025, global EUV Underlayer Materials production reached approximately 2,500 metric tons.

Demand for EUV underlayer materials is primarily driven by more EUV layers, thinner resist films, and tighter control of stochastic defects and pattern collapse. As advanced nodes tighten specifications for defects, trace metals, particles, film uniformity, and lot-to-lot consistency, qualification cycles become longer and supplier stickiness increases. Purification capability, formulation consistency, and joint qualification with leading fabs are therefore central competitive factors.

Future growth will also be supported by High-NA EUV, ultrathin resists, higher etch-transfer requirements, and sensitizing underlayer technologies. As logic, memory, and advanced packaging flows become more complex, both the number of material-intensive process steps and the required performance per wafer increase. Localization, supply-chain resilience, and environmental compliance will create openings for new suppliers, although scaled adoption will still depend on long-term reliability and high-volume manufacturing qualification.

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Report Scope

This report studies the global EUV Underlayer Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for EUV Underlayer Materials and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of EUV Underlayer Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global EUV Underlayer Materials total production and demand, 2021-2032, (Kilotons)

Global EUV Underlayer Materials total production value, 2021-2032, (USD Million)

Global EUV Underlayer Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global EUV Underlayer Materials consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: EUV Underlayer Materials domestic production, consumption, key domestic manufacturers and share

Global EUV Underlayer Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global EUV Underlayer Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global EUV Underlayer Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

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This report profiles key players in the global EUV Underlayer Materials market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Brewer Science, Nissan Chemical, TOK, JSR, Merck, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World EUV Underlayer Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global EUV Underlayer Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global EUV Underlayer Materials Market, Segmentation by Type:

Organic EUV Underlayer

Silicon-Containing EUV Underlayer

Metal-Oxide EUV Underlayer

Organic-Inorganic Hybrid Underlayer

Other

Global EUV Underlayer Materials Market, Segmentation by Primary Function:

Adhesion-Promoting Underlayer

Sensitivity-Enhancing Underlayer

Etch-Transfer Underlayer

Planarizing Underlayer

Other

Global EUV Underlayer Materials Market, Segmentation by Coating Method:

Spin-On Underlayer

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Vapor-Deposited Underlayer

Dry-Film Underlayer

Other

Global EUV Underlayer Materials Market, Segmentation by Application:

EUV Logic Lithography

EUV DRAM Lithography

EUV NAND Peripheral Patterning

High-NA EUV Lithography

Other

Companies Profiled:

Brewer Science

Nissan Chemical

TOK

JSR

Merck

Key Questions Answered

1. How big is the global EUV Underlayer Materials market?
2. What is the demand of the global EUV Underlayer Materials market?

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3. What is the year over year growth of the global EUV Underlayer Materials market?
4. What is the total value of the global EUV Underlayer Materials market?
5. Who are the Major Players in the global EUV Underlayer Materials market?
6. What are the growth factors driving the market demand?

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