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Global EUV Underlayer 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 Underlayer Materials market size was valued at US$ 216 million in 2025 and is forecast to a readjusted size of US$ 676 million by 2032 with a CAGR of 17.1% during review period.

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

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suppliers, although scaled adoption will still depend on long-term reliability and high-volume manufacturing qualification.

Report Scope

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

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

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

Global EUV Underlayer Materials market shares of main players, shipments in revenue ($ Million), sales quantity (Kilotons), 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 Underlayer Materials

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

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To assess competitive factors affecting the marketplace

This report profiles key players in the global EUV Underlayer 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 Brewer Science, Nissan Chemical, TOK, JSR, Merck, etc.

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

EUV Underlayer 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 Segmentation

Market segment by Type

Organic EUV Underlayer

Silicon-Containing EUV Underlayer

Metal-Oxide EUV Underlayer

Organic-Inorganic Hybrid Underlayer

Other

Market segment by Primary Function

Adhesion-Promoting Underlayer

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Sensitivity-Enhancing Underlayer

Etch-Transfer Underlayer

Planarizing Underlayer

Other

Market segment by Coating Method

Spin-On Underlayer

Vapor-Deposited Underlayer

Dry-Film Underlayer

Other

Market segment by Application

EUV Logic Lithography

EUV DRAM Lithography

EUV NAND Peripheral Patterning

High-NA EUV Lithography

Other

Major players covered

Brewer Science

Nissan Chemical

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TOK

JSR

Merck

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)

Chapter Outline

Chapter 1, to describe EUV Underlayer Materials product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of EUV Underlayer Materials, with price, sales quantity, revenue, and global market share of EUV Underlayer Materials from 2021 to 2026.
Chapter 3, the EUV Underlayer Materials competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.
Chapter 4, the EUV Underlayer 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

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quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and EUV Underlayer 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 Underlayer Materials.
Chapter 14 and 15, to describe EUV Underlayer Materials sales channel, distributors, customers, research findings and conclusion.

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