

Global M9 Grade ODV Hydrocarbon Resin Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GCB11C5A4ED7EN.html>

Date: June 2026

Pages: 101

Price: US\$ 4,480.00 (Single User License)

ID: GCB11C5A4ED7EN

Abstracts

The global M9 Grade ODV Hydrocarbon Resin market size is expected to reach \$ 440 million by 2032, rising at a market growth of 38.7% CAGR during the forecast period (2026-2032).

M9 Grade ODV Hydrocarbon Resin refers to specialty hydrocarbon resin used in M9 grade copper clad laminate. ODV (multi-functional vinyl aromatic copolymer developed by Nippon Steel Chemical & Material Co., Ltd.) represents one of the most representative technology routes among M9 grade hydrocarbon resins, alongside BCB (benzocyclobutene) and EX (acenaphthylene). M9 grade hydrocarbon resin is a carbon-hydrogen polymer chain containing no polar groups, capable of reducing dissipation factor (Df) to approximately 0.0005, meeting the stringent ultra-low loss requirements of M9 CCL. The core value of ODV resin lies in its extremely low dielectric loss (Df

M9 ODV hydrocarbon resin is the core material for NVIDIA's next-generation Rubin AI server platform. Its value lies not in market size, but in enabling the transition from M8 to M9 PCBs that support 112G/224G PAM4 signaling. Technical barriers are extremely high: ODV (multi-functional vinyl aromatic copolymer) demands ultra-low polarity, narrow molecular weight distribution, and sub-ppm impurity control, making synthesis and purification far more difficult than M8-grade resins. Globally, Nippon Steel Chemical & Material, as the originator and long-time monopolist of ODV technology, dominates the high-end market through decades of process know-how and patent walls. Among domestic challengers, Dongcai Technology has achieved mass production and is the exclusive resin supplier for NVIDIA's Rubin architecture; Shengguan Group has small-batch shipments of ODV-route resin; Shijiazhuang Chengzhi Yonghua, Meilian New Materials, and Tongyu New Materials are at certification or early-stage mass production. Pricing: due to scarcity and capacity

constraints, ODV resin trades at USD 500,000-700,000/ton, far above M8 grade (~USD 100,000/ton). Margins are highly uneven: Nippon Steel enjoys monopolistic margins (likely >50%); Dongcai, as the exclusive NVIDIA supplier with tight capacity, may see gross margin rise from ~20% to above 30%; other domestic players are still losing money or barely break-even. Supply-demand gap is severe: global effective capacity of M9-grade hydrocarbon resins (ODV, BCB, etc.) is only ~3,000 tons in 2026, while demand from just the Rubin platform exceeds 5,000 tons. Downstream applications are almost entirely in AI compute clusters: Rubin OAM accelerator cards (7-layer M9 HDI) and UBB backplanes (26-layer M9 through-hole) absorb most of the output, with small volumes for 1.6T switches and optical modules. The value chain is short and specialised: resin makers → CCL manufacturers (EMC, Doosan, Shengyi) → PCB makers (Wus, Unimicron) → end customers like NVIDIA. Certification barriers are extremely high and exclusive: entering NVIDIA's supply chain requires 2-3 years of rigorous validation; once qualified, suppliers are locked in with high switching costs. Landscape: ODV route shows a 'one superpower, multiple challengers' pattern → Nippon Steel is the superpower, Dongcai is the strongest challenger, and others form the second tier. Uncertainties include technology substitution risk (BCB, modified PPO), capacity ramp-up (Dongcai's new 3,500-ton line), and geopolitics affecting high-end material exports. Conclusion: M9 ODV hydrocarbon resin is one of the most critical and scarcest links in the domestic AI hardware supply chain. Its core driver is the rigid demand for ultra-low loss PCBs driven by NVIDIA's Rubin platform mass production. Structural features are extreme technical barriers, long certification cycles, a widening supply-demand gap, and nascent domestic substitution. In the short term, Nippon Steel will maintain its high-end monopoly, but domestic players like Dongcai are poised to gain share in 2026-2027 through capacity release and exclusive supply status.

This report studies the global M9 Grade ODV Hydrocarbon Resin production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for M9 Grade ODV Hydrocarbon Resin 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 M9 Grade ODV Hydrocarbon Resin that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global M9 Grade ODV Hydrocarbon Resin total production and demand, 2021-2032, (Tons)

Global M9 Grade ODV Hydrocarbon Resin total production value, 2021-2032, (USD

Million)

Global M9 Grade ODV Hydrocarbon Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global M9 Grade ODV Hydrocarbon Resin consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: M9 Grade ODV Hydrocarbon Resin domestic production, consumption, key domestic manufacturers and share

Global M9 Grade ODV Hydrocarbon Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global M9 Grade ODV Hydrocarbon Resin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global M9 Grade ODV Hydrocarbon Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global M9 Grade ODV Hydrocarbon Resin 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 Nippon Steel Chemical & Material, Dongcai Technology, Shengguan Group, Shijiazhuang Chengzhi Yonghua (Saimo Technology), Meilian New Materials, Tongyu New Materials, SABIC (Specialties), 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 M9 Grade ODV Hydrocarbon Resin market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 M9 Grade ODV Hydrocarbon Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global M9 Grade ODV Hydrocarbon Resin Market, Segmentation by Type:

Standard M9 (Df ≤ 0.0015 , Dk 2.8 ± 0.3)

Ultra-low Loss M9 (Df ≤ 0.0010 , Dk 2.6 ± 0.2)

Extreme-low Loss M9 (Df ≤ 0.0005 , Dk 2.4 ± 0.2)

Global M9 Grade ODV Hydrocarbon Resin Market, Segmentation by Function:

High-Speed Differential Pair Dielectric

Build-up Layer Dielectric

Core & Prepreg for Thick Backplane

Antenna Integration Layer

Global M9 Grade ODV Hydrocarbon Resin Market, Segmentation by Application:

Rubin Platform OAM

Rubin Platform UBB

1.6T Switch PCB

Optical Module Substrate (800G/1.6T)

Others

Companies Profiled:

Nippon Steel Chemical & Material

Dongcai Technology

Shengguan Group

Shijiazhuang Chengzhi Yonghua (Saimo Technology)

Meilian New Materials

Tongyu New Materials

SABIC (Specialties)

Key Questions Answered:

1. How big is the global M9 Grade ODV Hydrocarbon Resin market?
2. What is the demand of the global M9 Grade ODV Hydrocarbon Resin market?
3. What is the year over year growth of the global M9 Grade ODV Hydrocarbon Resin market?
4. What is the production and production value of the global M9 Grade ODV Hydrocarbon Resin market?
5. Who are the key producers in the global M9 Grade ODV Hydrocarbon Resin market?
6. What are the growth factors driving the market demand?

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