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Global Metal-containing EUV Hard Mask Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Metal-containing EUV Hard Mask Materials market size is expected to reach $ 315 million by 2032, rising at a market growth of 19.5% CAGR during the forecast period (2026-2032).

Metal-containing EUV hard mask materials are metal-based thin films used in EUV multilayer patterning to provide high etch selectivity and dimensional fidelity. They can employ Hf-, Zr-, Ti-, or Sn-based oxides, nitrides, or metal-organic hybrid chemistries and can be deposited by spin coating or vapor-phase methods. Their value is the ability to deliver strong etch resistance at very low thickness while maintaining low defects and contamination, removability, and interface compatibility with ultrathin EUV photoresists. In 2025, global Metal-containing EUV Hard Mask Materials production reached approximately 200 metric tons.

Demand for metal-containing EUV hard mask materials is primarily driven by insufficient pattern-transfer capability of increasingly thin EUV resists and harder etch requirements for GAA-class structures. 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-selectivity spin-on metal oxides, low-temperature vapor-deposited hard masks, and controlled wet-removal platforms. 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

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reliability and high-volume manufacturing qualification.

Report Scope

This report studies the global Metal-containing EUV Hard Mask Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Metal-containing EUV Hard Mask 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 Metal-containing EUV Hard Mask Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Metal-containing EUV Hard Mask Materials total production and demand, 2021-2032, (Kilotons)

Global Metal-containing EUV Hard Mask Materials total production value, 2021-2032, (USD Million)

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

Global Metal-containing EUV Hard Mask Materials consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Metal-containing EUV Hard Mask Materials domestic production, consumption, key domestic manufacturers and share

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

Global Metal-containing EUV Hard Mask Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

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Global Metal-containing EUV Hard Mask Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Metal-containing EUV Hard Mask 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 Merck, Nissan Chemical, Brewer Science, JSR, 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 Metal-containing EUV Hard Mask 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 Metal-containing EUV Hard Mask Materials Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Market Segmentation

Global Metal-containing EUV Hard Mask Materials Market, Segmentation by Type:

Hafnium-Based Hard Mask

Zirconium-Based Hard Mask

Titanium-Based Hard Mask

Tin-Based Hard Mask

Other Metal-Based Hard Mask

Global Metal-containing EUV Hard Mask Materials Market, Segmentation by Chemical Matrix:

Metal Oxide

Metal Nitride/Oxynitride

Metal-Organic Hybrid

Other

Global Metal-containing EUV Hard Mask Materials Market, Segmentation by Deposition Method:

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Spin-On

ALD/CVD

PVD

Other

Global Metal-containing EUV Hard Mask Materials Market, Segmentation by Application:

High-NA EUV Logic Patterning

EUV DRAM Pattern Transfer

GAA/Nanosheet Pattern Transfer

High-Aspect-Ratio Memory Patterning

Other

Companies Profiled:

Merck

Nissan Chemical

Brewer Science

JSR

Key Questions Answered

1. How big is the global Metal-containing EUV Hard Mask Materials market?
2. What is the demand of the global Metal-containing EUV Hard Mask Materials

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

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