

# Global SOC (Spin on Carbon) Hardmasks Market 2024 by Manufacturers, Regions, Type and Application, Forecast to 2030

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## Abstracts

According to our (Global Info Research) latest study, the global SOC (Spin on Carbon) Hardmasks market size was valued at USD 121.6 million in 2023 and is forecast to a readjusted size of USD 215 million by 2030 with a CAGR of 8.5% during review period.

Spin-on Carbon (SOC) hardmasks can be used in multilayer lithography processes with high etch resistance, low cost of ownership, low defects, high alignment accuracy, good gap filling and topography planarization. SOC is a high carbon-containing polymer solution. As a coating material, the polymer needs to be dissolved in an organic solvent and insoluble in the upper layer of the coating after curing. The high carbon content (>80%) of the SOC is important for good etch resistance.

Spin-on Carbon (SOC) hardmasks are an increasingly key component of the micro-chip fabrication process. They are frequently used to improve the resists' selectivity to silicon during plasma etching. Furthermore, as chip architectures become increasingly complex the use of hardmasks to improve the aspect ratio of features in silicon is critical. In this context, the 'aspect ratio' is the ratio between the height of a feature on a silicon wafer and its width. For many emerging multi-layer chip architectures, such as tri-layer etch-stacks, a large height to width ratio is required to maintain small lateral features across multiple vertical layers.

Global key players of SOC (Spin on Carbon) hardmasks include Samsung SDI, Merck Group, JSR, Brewer Science, etc. The top three players hold a share over 75%.

Asia-Pacific is the largest market, has a share about 62%, followed by North America, and Europe, with share 18% and 16%, separately.

In terms of product type, hot-temperature spin on carbon hardmask is the largest segment, occupied for a share of 80.9%, and in terms of application, semiconductors (excl. Memory) has a share about 50 percent.

The Global Info Research report includes an overview of the development of the SOC (Spin on Carbon) Hardmasks industry chain, the market status of Semiconductors (excl. Memory) (Hot-Temperature Spin on Carbon Hardmask, Normal Spin on Carbon Hardmask), DRAM (Hot-Temperature Spin on Carbon Hardmask, Normal Spin on Carbon Hardmask), and key enterprises in developed and developing market, and analysed the cutting-edge technology, patent, hot applications and market trends of SOC (Spin on Carbon) Hardmasks.

Regionally, the report analyzes the SOC (Spin on Carbon) Hardmasks markets in key regions. North America and Europe are experiencing steady growth, driven by government initiatives and increasing consumer awareness. Asia-Pacific, particularly China, leads the global SOC (Spin on Carbon) Hardmasks market, with robust domestic demand, supportive policies, and a strong manufacturing base.

#### Key Features:

The report presents comprehensive understanding of the SOC (Spin on Carbon) Hardmasks market. It provides a holistic view of the industry, as well as detailed insights into individual components and stakeholders. The report analysis market dynamics, trends, challenges, and opportunities within the SOC (Spin on Carbon) Hardmasks industry.

The report involves analyzing the market at a macro level:

**Market Sizing and Segmentation:** Report collect data on the overall market size, including the sales quantity (m?), revenue generated, and market share of different by Type (e.g., Hot-Temperature Spin on Carbon Hardmask, Normal Spin on Carbon Hardmask).

**Industry Analysis:** Report analyse the broader industry trends, such as government policies and regulations, technological advancements, consumer preferences, and market dynamics. This analysis helps in understanding the key drivers and challenges influencing the SOC (Spin on Carbon) Hardmasks market.

**Regional Analysis:** The report involves examining the SOC (Spin on Carbon) Hardmasks market at a regional or national level. Report analyses regional factors such as government incentives, infrastructure development, economic conditions, and consumer behaviour to identify variations and opportunities within different markets.

**Market Projections:** Report covers the gathered data and analysis to make future projections and forecasts for the SOC (Spin on Carbon) Hardmasks market. This may include estimating market growth rates, predicting market demand, and identifying emerging trends.

The report also involves a more granular approach to SOC (Spin on Carbon) Hardmasks:

**Company Analysis:** Report covers individual SOC (Spin on Carbon) Hardmasks manufacturers, suppliers, and other relevant industry players. This analysis includes studying their financial performance, market positioning, product portfolios, partnerships, and strategies.

**Consumer Analysis:** Report covers data on consumer behaviour, preferences, and attitudes towards SOC (Spin on Carbon) Hardmasks. This may involve surveys, interviews, and analysis of consumer reviews and feedback from different by Application (Semiconductors (excl. Memory), DRAM).

**Technology Analysis:** Report covers specific technologies relevant to SOC (Spin on Carbon) Hardmasks. It assesses the current state, advancements, and potential future developments in SOC (Spin on Carbon) Hardmasks areas.

**Competitive Landscape:** By analyzing individual companies, suppliers, and consumers, the report present insights into the competitive landscape of the SOC (Spin on Carbon) Hardmasks market. This analysis helps understand market share, competitive advantages, and potential areas for differentiation among industry players.

**Market Validation:** The report involves validating findings and projections through primary research, such as surveys, interviews, and focus groups.

## Market Segmentation

SOC (Spin on Carbon) Hardmasks market is split by Type and by Application. For the period 2019-2030, the growth among segments provides accurate calculations and

forecasts for consumption value by Type, and by Application in terms of volume and value.

#### Market segment by Type

Hot-Temperature Spin on Carbon Hardmask

Normal Spin on Carbon Hardmask

#### Market segment by Application

Semiconductors (excl. Memory)

DRAM

NAND

LCDs

#### Major players covered

Samsung SDI

Merck Group

JSR

Brewer Science

Shin-Etsu MicroSi

YCCHEM

Nano-C

#### Market segment by region, regional analysis covers

*Global SOC (Spin on Carbon) Hardmasks Market 2024 by Manufacturers, Regions, Type and Application, Forecast to...*

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 SOC (Spin on Carbon) Hardmasks product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of SOC (Spin on Carbon) Hardmasks, with price, sales, revenue and global market share of SOC (Spin on Carbon) Hardmasks from 2019 to 2024.

Chapter 3, the SOC (Spin on Carbon) Hardmasks competitive situation, sales quantity, revenue and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the SOC (Spin on Carbon) Hardmasks breakdown data are shown at the regional level, to show the sales quantity, consumption value and growth by regions, from 2019 to 2030.

Chapter 5 and 6, to segment the sales by Type and application, with sales market share and growth rate by type, application, from 2019 to 2030.

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 2017 to 2023. and SOC (Spin on Carbon) Hardmasks market forecast, by regions, type and application, with sales and revenue, from 2025 to 2030.

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 SOC (Spin on Carbon) Hardmasks.

Chapter 14 and 15, to describe SOC (Spin on Carbon) Hardmasks sales channel, distributors, customers, research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

- 1.1 Product Overview and Scope of SOC (Spin on Carbon) Hardmasks
- 1.2 Market Estimation Caveats and Base Year
- 1.3 Market Analysis by Type
  - 1.3.1 Overview: Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type: 2019 Versus 2023 Versus 2030
  - 1.3.2 Hot-Temperature Spin on Carbon Hardmask
  - 1.3.3 Normal Spin on Carbon Hardmask
- 1.4 Market Analysis by Application
  - 1.4.1 Overview: Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application: 2019 Versus 2023 Versus 2030
  - 1.4.2 Semiconductors (excl. Memory)
  - 1.4.3 DRAM
  - 1.4.4 NAND
  - 1.4.5 LCDs
- 1.5 Global SOC (Spin on Carbon) Hardmasks Market Size & Forecast
  - 1.5.1 Global SOC (Spin on Carbon) Hardmasks Consumption Value (2019 & 2023 & 2030)
  - 1.5.2 Global SOC (Spin on Carbon) Hardmasks Sales Quantity (2019-2030)
  - 1.5.3 Global SOC (Spin on Carbon) Hardmasks Average Price (2019-2030)

### 2 MANUFACTURERS PROFILES

- 2.1 Samsung SDI
  - 2.1.1 Samsung SDI Details
  - 2.1.2 Samsung SDI Major Business
  - 2.1.3 Samsung SDI SOC (Spin on Carbon) Hardmasks Product and Services
  - 2.1.4 Samsung SDI SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)
  - 2.1.5 Samsung SDI Recent Developments/Updates
- 2.2 Merck Group
  - 2.2.1 Merck Group Details
  - 2.2.2 Merck Group Major Business
  - 2.2.3 Merck Group SOC (Spin on Carbon) Hardmasks Product and Services
  - 2.2.4 Merck Group SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

## 2.2.5 Merck Group Recent Developments/Updates

## 2.3 JSR

### 2.3.1 JSR Details

### 2.3.2 JSR Major Business

### 2.3.3 JSR SOC (Spin on Carbon) Hardmasks Product and Services

### 2.3.4 JSR SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

### 2.3.5 JSR Recent Developments/Updates

## 2.4 Brewer Science

### 2.4.1 Brewer Science Details

### 2.4.2 Brewer Science Major Business

### 2.4.3 Brewer Science SOC (Spin on Carbon) Hardmasks Product and Services

### 2.4.4 Brewer Science SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

### 2.4.5 Brewer Science Recent Developments/Updates

## 2.5 Shin-Etsu MicroSi

### 2.5.1 Shin-Etsu MicroSi Details

### 2.5.2 Shin-Etsu MicroSi Major Business

### 2.5.3 Shin-Etsu MicroSi SOC (Spin on Carbon) Hardmasks Product and Services

### 2.5.4 Shin-Etsu MicroSi SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

### 2.5.5 Shin-Etsu MicroSi Recent Developments/Updates

## 2.6 YCCHEM

### 2.6.1 YCCHEM Details

### 2.6.2 YCCHEM Major Business

### 2.6.3 YCCHEM SOC (Spin on Carbon) Hardmasks Product and Services

### 2.6.4 YCCHEM SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

### 2.6.5 YCCHEM Recent Developments/Updates

## 2.7 Nano-C

### 2.7.1 Nano-C Details

### 2.7.2 Nano-C Major Business

### 2.7.3 Nano-C SOC (Spin on Carbon) Hardmasks Product and Services

### 2.7.4 Nano-C SOC (Spin on Carbon) Hardmasks Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2019-2024)

### 2.7.5 Nano-C Recent Developments/Updates

## **3 COMPETITIVE ENVIRONMENT: SOC (SPIN ON CARBON) HARDMASKS BY MANUFACTURER**



- 3.1 Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Manufacturer (2019-2024)
- 3.2 Global SOC (Spin on Carbon) Hardmasks Revenue by Manufacturer (2019-2024)
- 3.3 Global SOC (Spin on Carbon) Hardmasks Average Price by Manufacturer (2019-2024)
- 3.4 Market Share Analysis (2023)
  - 3.4.1 Producer Shipments of SOC (Spin on Carbon) Hardmasks by Manufacturer Revenue (\$MM) and Market Share (%): 2023
  - 3.4.2 Top 3 SOC (Spin on Carbon) Hardmasks Manufacturer Market Share in 2023
  - 3.4.2 Top 6 SOC (Spin on Carbon) Hardmasks Manufacturer Market Share in 2023
- 3.5 SOC (Spin on Carbon) Hardmasks Market: Overall Company Footprint Analysis
  - 3.5.1 SOC (Spin on Carbon) Hardmasks Market: Region Footprint
  - 3.5.2 SOC (Spin on Carbon) Hardmasks Market: Company Product Type Footprint
  - 3.5.3 SOC (Spin on Carbon) Hardmasks Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

## **4 CONSUMPTION ANALYSIS BY REGION**

- 4.1 Global SOC (Spin on Carbon) Hardmasks Market Size by Region
  - 4.1.1 Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2019-2030)
  - 4.1.2 Global SOC (Spin on Carbon) Hardmasks Consumption Value by Region (2019-2030)
  - 4.1.3 Global SOC (Spin on Carbon) Hardmasks Average Price by Region (2019-2030)
- 4.2 North America SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030)
- 4.3 Europe SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030)
- 4.4 Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030)
- 4.5 South America SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030)
- 4.6 Middle East and Africa SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030)

## **5 MARKET SEGMENT BY TYPE**

- 5.1 Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)
- 5.2 Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type (2019-2030)
- 5.3 Global SOC (Spin on Carbon) Hardmasks Average Price by Type (2019-2030)

## **6 MARKET SEGMENT BY APPLICATION**

- 6.1 Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)
- 6.2 Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application (2019-2030)
- 6.3 Global SOC (Spin on Carbon) Hardmasks Average Price by Application (2019-2030)

## **7 NORTH AMERICA**

- 7.1 North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)
- 7.2 North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)
- 7.3 North America SOC (Spin on Carbon) Hardmasks Market Size by Country
  - 7.3.1 North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2030)
  - 7.3.2 North America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2030)
  - 7.3.3 United States Market Size and Forecast (2019-2030)
  - 7.3.4 Canada Market Size and Forecast (2019-2030)
  - 7.3.5 Mexico Market Size and Forecast (2019-2030)

## **8 EUROPE**

- 8.1 Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)
- 8.2 Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)
- 8.3 Europe SOC (Spin on Carbon) Hardmasks Market Size by Country
  - 8.3.1 Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2030)
  - 8.3.2 Europe SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2030)
  - 8.3.3 Germany Market Size and Forecast (2019-2030)
  - 8.3.4 France Market Size and Forecast (2019-2030)
  - 8.3.5 United Kingdom Market Size and Forecast (2019-2030)
  - 8.3.6 Russia Market Size and Forecast (2019-2030)
  - 8.3.7 Italy Market Size and Forecast (2019-2030)

## **9 ASIA-PACIFIC**

9.1 Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)

9.2 Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)

9.3 Asia-Pacific SOC (Spin on Carbon) Hardmasks Market Size by Region

9.3.1 Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2019-2030)

9.3.2 Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value by Region (2019-2030)

9.3.3 China Market Size and Forecast (2019-2030)

9.3.4 Japan Market Size and Forecast (2019-2030)

9.3.5 Korea Market Size and Forecast (2019-2030)

9.3.6 India Market Size and Forecast (2019-2030)

9.3.7 Southeast Asia Market Size and Forecast (2019-2030)

9.3.8 Australia Market Size and Forecast (2019-2030)

## **10 SOUTH AMERICA**

10.1 South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)

10.2 South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)

10.3 South America SOC (Spin on Carbon) Hardmasks Market Size by Country

10.3.1 South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2030)

10.3.2 South America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2030)

10.3.3 Brazil Market Size and Forecast (2019-2030)

10.3.4 Argentina Market Size and Forecast (2019-2030)

## **11 MIDDLE EAST & AFRICA**

11.1 Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2030)

11.2 Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2030)

11.3 Middle East & Africa SOC (Spin on Carbon) Hardmasks Market Size by Country

11.3.1 Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2030)

11.3.2 Middle East & Africa SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2030)

11.3.3 Turkey Market Size and Forecast (2019-2030)

11.3.4 Egypt Market Size and Forecast (2019-2030)

11.3.5 Saudi Arabia Market Size and Forecast (2019-2030)

11.3.6 South Africa Market Size and Forecast (2019-2030)

## **12 MARKET DYNAMICS**

12.1 SOC (Spin on Carbon) Hardmasks Market Drivers

12.2 SOC (Spin on Carbon) Hardmasks Market Restraints

12.3 SOC (Spin on Carbon) Hardmasks Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

## **13 RAW MATERIAL AND INDUSTRY CHAIN**

13.1 Raw Material of SOC (Spin on Carbon) Hardmasks and Key Manufacturers

13.2 Manufacturing Costs Percentage of SOC (Spin on Carbon) Hardmasks

13.3 SOC (Spin on Carbon) Hardmasks Production Process

13.4 SOC (Spin on Carbon) Hardmasks Industrial Chain

## **14 SHIPMENTS BY DISTRIBUTION CHANNEL**

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 SOC (Spin on Carbon) Hardmasks Typical Distributors

14.3 SOC (Spin on Carbon) Hardmasks Typical Customers

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 APPENDIX**

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type, (USD Million), 2019 & 2023 & 2030

Table 2. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application, (USD Million), 2019 & 2023 & 2030

Table 3. Samsung SDI Basic Information, Manufacturing Base and Competitors

Table 4. Samsung SDI Major Business

Table 5. Samsung SDI SOC (Spin on Carbon) Hardmasks Product and Services

Table 6. Samsung SDI SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 7. Samsung SDI Recent Developments/Updates

Table 8. Merck Group Basic Information, Manufacturing Base and Competitors

Table 9. Merck Group Major Business

Table 10. Merck Group SOC (Spin on Carbon) Hardmasks Product and Services

Table 11. Merck Group SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 12. Merck Group Recent Developments/Updates

Table 13. JSR Basic Information, Manufacturing Base and Competitors

Table 14. JSR Major Business

Table 15. JSR SOC (Spin on Carbon) Hardmasks Product and Services

Table 16. JSR SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 17. JSR Recent Developments/Updates

Table 18. Brewer Science Basic Information, Manufacturing Base and Competitors

Table 19. Brewer Science Major Business

Table 20. Brewer Science SOC (Spin on Carbon) Hardmasks Product and Services

Table 21. Brewer Science SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 22. Brewer Science Recent Developments/Updates

Table 23. Shin-Etsu MicroSi Basic Information, Manufacturing Base and Competitors

Table 24. Shin-Etsu MicroSi Major Business

Table 25. Shin-Etsu MicroSi SOC (Spin on Carbon) Hardmasks Product and Services

Table 26. Shin-Etsu MicroSi SOC (Spin on Carbon) Hardmasks Sales Quantity (m?),

Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 27. Shin-Etsu MicroSi Recent Developments/Updates

Table 28. YCCHEM Basic Information, Manufacturing Base and Competitors

Table 29. YCCHEM Major Business

Table 30. YCCHEM SOC (Spin on Carbon) Hardmasks Product and Services

Table 31. YCCHEM SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 32. YCCHEM Recent Developments/Updates

Table 33. Nano-C Basic Information, Manufacturing Base and Competitors

Table 34. Nano-C Major Business

Table 35. Nano-C SOC (Spin on Carbon) Hardmasks Product and Services

Table 36. Nano-C SOC (Spin on Carbon) Hardmasks Sales Quantity (m?), Average Price (K USD/m?), Revenue (USD Million), Gross Margin and Market Share (2019-2024)

Table 37. Nano-C Recent Developments/Updates

Table 38. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Manufacturer (2019-2024) & (m?)

Table 39. Global SOC (Spin on Carbon) Hardmasks Revenue by Manufacturer (2019-2024) & (USD Million)

Table 40. Global SOC (Spin on Carbon) Hardmasks Average Price by Manufacturer (2019-2024) & (K USD/m?)

Table 41. Market Position of Manufacturers in SOC (Spin on Carbon) Hardmasks, (Tier 1, Tier 2, and Tier 3), Based on Consumption Value in 2023

Table 42. Head Office and SOC (Spin on Carbon) Hardmasks Production Site of Key Manufacturer

Table 43. SOC (Spin on Carbon) Hardmasks Market: Company Product Type Footprint

Table 44. SOC (Spin on Carbon) Hardmasks Market: Company Product Application Footprint

Table 45. SOC (Spin on Carbon) Hardmasks New Market Entrants and Barriers to Market Entry

Table 46. SOC (Spin on Carbon) Hardmasks Mergers, Acquisition, Agreements, and Collaborations

Table 47. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2019-2024) & (m?)

Table 48. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2025-2030) & (m?)

Table 49. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Region

(2019-2024) & (USD Million)

Table 50. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Region

(2025-2030) & (USD Million)

Table 51. Global SOC (Spin on Carbon) Hardmasks Average Price by Region

(2019-2024) & (K USD/m<sup>2</sup>)

Table 52. Global SOC (Spin on Carbon) Hardmasks Average Price by Region

(2025-2030) & (K USD/m<sup>2</sup>)

Table 53. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Type

(2019-2024) & (m<sup>2</sup>)

Table 54. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Type

(2025-2030) & (m<sup>2</sup>)

Table 55. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type

(2019-2024) & (USD Million)

Table 56. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type

(2025-2030) & (USD Million)

Table 57. Global SOC (Spin on Carbon) Hardmasks Average Price by Type

(2019-2024) & (K USD/m<sup>2</sup>)

Table 58. Global SOC (Spin on Carbon) Hardmasks Average Price by Type

(2025-2030) & (K USD/m<sup>2</sup>)

Table 59. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Application

(2019-2024) & (m<sup>2</sup>)

Table 60. Global SOC (Spin on Carbon) Hardmasks Sales Quantity by Application

(2025-2030) & (m<sup>2</sup>)

Table 61. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application

(2019-2024) & (USD Million)

Table 62. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application

(2025-2030) & (USD Million)

Table 63. Global SOC (Spin on Carbon) Hardmasks Average Price by Application

(2019-2024) & (K USD/m<sup>2</sup>)

Table 64. Global SOC (Spin on Carbon) Hardmasks Average Price by Application

(2025-2030) & (K USD/m<sup>2</sup>)

Table 65. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type

(2019-2024) & (m<sup>2</sup>)

Table 66. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type

(2025-2030) & (m<sup>2</sup>)

Table 67. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2024) & (m<sup>2</sup>)

Table 68. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2025-2030) & (m<sup>2</sup>)



Table 69. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2024) & (m?)

Table 70. North America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2025-2030) & (m?)

Table 71. North America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2024) & (USD Million)

Table 72. North America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2025-2030) & (USD Million)

Table 73. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2024) & (m?)

Table 74. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2025-2030) & (m?)

Table 75. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2024) & (m?)

Table 76. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2025-2030) & (m?)

Table 77. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2024) & (m?)

Table 78. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2025-2030) & (m?)

Table 79. Europe SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2024) & (USD Million)

Table 80. Europe SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2025-2030) & (USD Million)

Table 81. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2024) & (m?)

Table 82. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2025-2030) & (m?)

Table 83. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2024) & (m?)

Table 84. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2025-2030) & (m?)

Table 85. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2019-2024) & (m?)

Table 86. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2025-2030) & (m?)

Table 87. Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value by Region (2019-2024) & (USD Million)

Table 88. Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value by

Region (2025-2030) & (USD Million)

Table 89. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2024) & (m?)

Table 90. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2025-2030) & (m?)

Table 91. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2024) & (m?)

Table 92. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2025-2030) & (m?)

Table 93. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2019-2024) & (m?)

Table 94. South America SOC (Spin on Carbon) Hardmasks Sales Quantity by Country (2025-2030) & (m?)

Table 95. South America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2019-2024) & (USD Million)

Table 96. South America SOC (Spin on Carbon) Hardmasks Consumption Value by Country (2025-2030) & (USD Million)

Table 97. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2019-2024) & (m?)

Table 98. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Type (2025-2030) & (m?)

Table 99. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2019-2024) & (m?)

Table 100. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Application (2025-2030) & (m?)

Table 101. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2019-2024) & (m?)

Table 102. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity by Region (2025-2030) & (m?)

Table 103. Middle East & Africa SOC (Spin on Carbon) Hardmasks Consumption Value by Region (2019-2024) & (USD Million)

Table 104. Middle East & Africa SOC (Spin on Carbon) Hardmasks Consumption Value by Region (2025-2030) & (USD Million)

Table 105. SOC (Spin on Carbon) Hardmasks Raw Material

Table 106. Key Manufacturers of SOC (Spin on Carbon) Hardmasks Raw Materials

Table 107. SOC (Spin on Carbon) Hardmasks Typical Distributors

Table 108. SOC (Spin on Carbon) Hardmasks Typical Customers

## List Of Figures

### LIST OF FIGURES

- Figure 1. SOC (Spin on Carbon) Hardmasks Picture
- Figure 2. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Type, (USD Million), 2019 & 2023 & 2030
- Figure 3. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Type in 2023
- Figure 4. Hot-Temperature Spin on Carbon Hardmask Examples
- Figure 5. Normal Spin on Carbon Hardmask Examples
- Figure 6. Global SOC (Spin on Carbon) Hardmasks Consumption Value by Application, (USD Million), 2019 & 2023 & 2030
- Figure 7. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Application in 2023
- Figure 8. Semiconductors (excl. Memory) Examples
- Figure 9. DRAM Examples
- Figure 10. NAND Examples
- Figure 11. LCDs Examples
- Figure 12. Global SOC (Spin on Carbon) Hardmasks Consumption Value, (USD Million): 2019 & 2023 & 2030
- Figure 13. Global SOC (Spin on Carbon) Hardmasks Consumption Value and Forecast (2019-2030) & (USD Million)
- Figure 14. Global SOC (Spin on Carbon) Hardmasks Sales Quantity (2019-2030) & (m?)
- Figure 15. Global SOC (Spin on Carbon) Hardmasks Average Price (2019-2030) & (K USD/m?)
- Figure 16. Global SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Manufacturer in 2023
- Figure 17. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Manufacturer in 2023
- Figure 18. Producer Shipments of SOC (Spin on Carbon) Hardmasks by Manufacturer Sales Quantity (\$MM) and Market Share (%): 2023
- Figure 19. Top 3 SOC (Spin on Carbon) Hardmasks Manufacturer (Consumption Value) Market Share in 2023
- Figure 20. Top 6 SOC (Spin on Carbon) Hardmasks Manufacturer (Consumption Value) Market Share in 2023
- Figure 21. Global SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Region (2019-2030)

Figure 22. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Region (2019-2030)

Figure 23. North America SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030) & (USD Million)

Figure 24. Europe SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030) & (USD Million)

Figure 25. Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030) & (USD Million)

Figure 26. South America SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030) & (USD Million)

Figure 27. Middle East & Africa SOC (Spin on Carbon) Hardmasks Consumption Value (2019-2030) & (USD Million)

Figure 28. Global SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Type (2019-2030)

Figure 29. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Type (2019-2030)

Figure 30. Global SOC (Spin on Carbon) Hardmasks Average Price by Type (2019-2030) & (K USD/m<sup>2</sup>)

Figure 31. Global SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)

Figure 32. Global SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Application (2019-2030)

Figure 33. Global SOC (Spin on Carbon) Hardmasks Average Price by Application (2019-2030) & (K USD/m<sup>2</sup>)

Figure 34. North America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Type (2019-2030)

Figure 35. North America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)

Figure 36. North America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Country (2019-2030)

Figure 37. North America SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Country (2019-2030)

Figure 38. United States SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 39. Canada SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 40. Mexico SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 41. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by

Type (2019-2030)

Figure 42. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)

Figure 43. Europe SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Country (2019-2030)

Figure 44. Europe SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Country (2019-2030)

Figure 45. Germany SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 46. France SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 47. United Kingdom SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 48. Russia SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 49. Italy SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 50. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Type (2019-2030)

Figure 51. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)

Figure 52. Asia-Pacific SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Region (2019-2030)

Figure 53. Asia-Pacific SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Region (2019-2030)

Figure 54. China SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 55. Japan SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 56. Korea SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 57. India SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 58. Southeast Asia SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 59. Australia SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)

Figure 60. South America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Type (2019-2030)

- Figure 61. South America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)
- Figure 62. South America SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Country (2019-2030)
- Figure 63. South America SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Country (2019-2030)
- Figure 64. Brazil SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 65. Argentina SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 66. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Type (2019-2030)
- Figure 67. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Application (2019-2030)
- Figure 68. Middle East & Africa SOC (Spin on Carbon) Hardmasks Sales Quantity Market Share by Region (2019-2030)
- Figure 69. Middle East & Africa SOC (Spin on Carbon) Hardmasks Consumption Value Market Share by Region (2019-2030)
- Figure 70. Turkey SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 71. Egypt SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 72. Saudi Arabia SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 73. South Africa SOC (Spin on Carbon) Hardmasks Consumption Value and Growth Rate (2019-2030) & (USD Million)
- Figure 74. SOC (Spin on Carbon) Hardmasks Market Drivers
- Figure 75. SOC (Spin on Carbon) Hardmasks Market Restraints
- Figure 76. SOC (Spin on Carbon) Hardmasks Market Trends
- Figure 77. Porters Five Forces Analysis
- Figure 78. Manufacturing Cost Structure Analysis of SOC (Spin on Carbon) Hardmasks in 2023
- Figure 79. Manufacturing Process Analysis of SOC (Spin on Carbon) Hardmasks
- Figure 80. SOC (Spin on Carbon) Hardmasks Industrial Chain
- Figure 81. Sales Quantity Channel: Direct to End-User vs Distributors
- Figure 82. Direct Channel Pros & Cons
- Figure 83. Indirect Channel Pros & Cons
- Figure 84. Methodology
- Figure 85. Research Process and Data Source

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