

Global Spin-on Carbon Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Spin-on Carbon Materials market size is expected to reach \$ 197 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Spin-on Carbon Materials (SOC) are carbon-rich organic thin-film materials used in advanced semiconductor lithography and pattern-transfer processes. They are typically supplied in liquid form, uniformly coated onto wafer surfaces by spin coating, and subsequently thermally cured to form dense carbon-rich films. In multilayer lithography stacks, SOC is generally positioned beneath the photoresist and silicon-containing hardmask, where it provides planarization, enhanced etch resistance, and improved deep-pattern-transfer capability, enabling patterns formed in thin photoresist layers to be accurately transferred into underlying device structures. Compared with certain CVD-deposited carbon films, spin-on carbon materials offer flexible processing, high coating throughput, strong planarization capability, and compatibility with existing coating and developing equipment, making them important materials for advanced logic, DRAM, 3D NAND, and other high-density semiconductor devices. In 2025, global Spin-on Carbon Materials production reached approximately 824 tons, with an average global market price of around 140 k USD/ton. The production capacity for Spin-on Carbon Materials in 2025 was approximately 1000 tons. The typical gross profit margin for Spin-on Carbon Materials between 20% and 40%.

The global spin-on carbon materials market is being driven by continued semiconductor process scaling, the development of EUV and High-NA EUV lithography, increasing structural complexity in memory devices, and growing demand for high-aspect-ratio etching. As advanced logic devices, DRAM, and 3D NAND move toward smaller feature sizes, higher layer counts, and increasingly complex three-dimensional structures, conventional single-layer lithography processes are becoming less capable of meeting

demanding resolution and deep-pattern-transfer requirements. This is increasing the importance of multilayer lithography and hardmask schemes and supporting demand for SOC materials. Future competition is expected to focus on products offering high carbon content, strong etch resistance, low defectivity, superior planarization, high thermal stability, and compatibility with advanced EUV processes. Long qualification cycles and significant formulation barriers also provide established suppliers with proven mass-production capability and wafer-fab validation a strong competitive position.

This report studies the global Spin-on Carbon Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Spin-on Carbon 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 Spin-on Carbon Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Spin-on Carbon Materials total production and demand, 2021-2032, (Tons)

Global Spin-on Carbon Materials total production value, 2021-2032, (USD Million)

Global Spin-on Carbon Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Spin-on Carbon Materials consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Spin-on Carbon Materials domestic production, consumption, key domestic manufacturers and share

Global Spin-on Carbon Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Spin-on Carbon Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Spin-on Carbon Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Spin-on Carbon 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, Merck KGaA, Samsung SDI,

DuPont, Nissan Chemical, Honeywell, Dongjin Semichem, YCCHEM Co., Ltd., JSR Micro, Irresistible Materials, 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 Spin-on Carbon Materials 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 Spin-on Carbon Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Spin-on Carbon Materials Market, Segmentation by Type:

Polymer-based Spin-on Carbon Materials

Small-molecule Spin-on Carbon Materials

Fullerene-based Spin-on Carbon Materials

Others

Global Spin-on Carbon Materials Market, Segmentation by Curing Temperature:

Low-temperature Curing SOC

Medium-temperature Curing SOC

High-temperature Curing SOC

Global Spin-on Carbon Materials Market, Segmentation by Film Thickness:

Ultra-thin Film SOC

Standard-thickness SOC

Thick-film SOC

Global Spin-on Carbon Materials Market, Segmentation by Application:

Logic Semiconductor Manufacturing

Memory Semiconductor Manufacturing

Advanced Packaging

Other

Companies Profiled:

Brewer Science

Merck KGaA

Samsung SDI

DuPont

Nissan Chemical

Honeywell

Dongjin Semichem

YCCHEM Co., Ltd.

JSR Micro

Irresistible Materials

Nano-C

DNF Co., Ltd.

KOYJ Co., Ltd.

Xiamen Hengkun New Materials Technology

Key Questions Answered:

1. How big is the global Spin-on Carbon Materials market?
2. What is the demand of the global Spin-on Carbon Materials market?
3. What is the year over year growth of the global Spin-on Carbon Materials market?
4. What is the production and production value of the global Spin-on Carbon Materials market?
5. Who are the key producers in the global Spin-on Carbon Materials market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Spin-on Carbon Materials Introduction
- 1.2 World Spin-on Carbon Materials Supply & Forecast
 - 1.2.1 World Spin-on Carbon Materials Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Spin-on Carbon Materials Production (2021-2032)
 - 1.2.3 World Spin-on Carbon Materials Pricing Trends (2021-2032)
- 1.3 World Spin-on Carbon Materials Production by Region (Based on Production Site)
 - 1.3.1 World Spin-on Carbon Materials Production Value by Region (2021-2032)
 - 1.3.2 World Spin-on Carbon Materials Production by Region (2021-2032)
 - 1.3.3 World Spin-on Carbon Materials Average Price by Region (2021-2032)
 - 1.3.4 North America Spin-on Carbon Materials Production (2021-2032)
 - 1.3.5 Europe Spin-on Carbon Materials Production (2021-2032)
 - 1.3.6 China Spin-on Carbon Materials Production (2021-2032)
 - 1.3.7 Japan Spin-on Carbon Materials Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Spin-on Carbon Materials Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Spin-on Carbon Materials Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Spin-on Carbon Materials Demand (2021-2032)
- 2.2 World Spin-on Carbon Materials Consumption by Region
 - 2.2.1 World Spin-on Carbon Materials Consumption by Region (2021-2026)
 - 2.2.2 World Spin-on Carbon Materials Consumption Forecast by Region (2027-2032)
- 2.3 United States Spin-on Carbon Materials Consumption (2021-2032)
- 2.4 China Spin-on Carbon Materials Consumption (2021-2032)
- 2.5 Europe Spin-on Carbon Materials Consumption (2021-2032)
- 2.6 Japan Spin-on Carbon Materials Consumption (2021-2032)
- 2.7 South Korea Spin-on Carbon Materials Consumption (2021-2032)
- 2.8 ASEAN Spin-on Carbon Materials Consumption (2021-2032)
- 2.9 India Spin-on Carbon Materials Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Spin-on Carbon Materials Production Value by Manufacturer (2021-2026)

- 3.2 World Spin-on Carbon Materials Production by Manufacturer (2021-2026)
- 3.3 World Spin-on Carbon Materials Average Price by Manufacturer (2021-2026)
- 3.4 Spin-on Carbon Materials Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Spin-on Carbon Materials Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Spin-on Carbon Materials in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Spin-on Carbon Materials in 2025
- 3.6 Spin-on Carbon Materials Market: Overall Company Footprint Analysis
 - 3.6.1 Spin-on Carbon Materials Market: Region Footprint
 - 3.6.2 Spin-on Carbon Materials Market: Company Product Type Footprint
 - 3.6.3 Spin-on Carbon Materials Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Spin-on Carbon Materials Production Value Comparison
 - 4.1.1 United States VS China: Spin-on Carbon Materials Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Spin-on Carbon Materials Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Spin-on Carbon Materials Production Comparison
 - 4.2.1 United States VS China: Spin-on Carbon Materials Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Spin-on Carbon Materials Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Spin-on Carbon Materials Consumption Comparison
 - 4.3.1 United States VS China: Spin-on Carbon Materials Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Spin-on Carbon Materials Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Spin-on Carbon Materials Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Spin-on Carbon Materials Production Value (2021-2026)

4.4.3 United States Based Manufacturers Spin-on Carbon Materials Production (2021-2026)

4.5 China Based Spin-on Carbon Materials Manufacturers and Market Share

4.5.1 China Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Spin-on Carbon Materials Production Value (2021-2026)

4.5.3 China Based Manufacturers Spin-on Carbon Materials Production (2021-2026)

4.6 Rest of World Based Spin-on Carbon Materials Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Spin-on Carbon Materials Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Spin-on Carbon Materials Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Spin-on Carbon Materials Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Polymer-based Spin-on Carbon Materials

5.2.2 Small-molecule Spin-on Carbon Materials

5.2.3 Fullerene-based Spin-on Carbon Materials

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Spin-on Carbon Materials Production by Type (2021-2032)

5.3.2 World Spin-on Carbon Materials Production Value by Type (2021-2032)

5.3.3 World Spin-on Carbon Materials Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CURING TEMPERATURE

6.1 World Spin-on Carbon Materials Market Size Overview by Curing Temperature: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Curing Temperature

6.2.1 Low-temperature Curing SOC

6.2.2 Medium-temperature Curing SOC

6.2.3 High-temperature Curing SOC

6.3 Market Segment by Curing Temperature

6.3.1 World Spin-on Carbon Materials Production by Curing Temperature (2021-2032)

6.3.2 World Spin-on Carbon Materials Production Value by Curing Temperature (2021-2032)

6.3.3 World Spin-on Carbon Materials Average Price by Curing Temperature (2021-2032)

7 MARKET ANALYSIS BY FILM THICKNESS

7.1 World Spin-on Carbon Materials Market Size Overview by Film Thickness: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Film Thickness

7.2.1 Ultra-thin Film SOC

7.2.2 Standard-thickness SOC

7.2.3 Thick-film SOC

7.3 Market Segment by Film Thickness

7.3.1 World Spin-on Carbon Materials Production by Film Thickness (2021-2032)

7.3.2 World Spin-on Carbon Materials Production Value by Film Thickness (2021-2032)

7.3.3 World Spin-on Carbon Materials Average Price by Film Thickness (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Spin-on Carbon Materials Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Logic Semiconductor Manufacturing

8.2.2 Memory Semiconductor Manufacturing

8.2.3 Advanced Packaging

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World Spin-on Carbon Materials Production by Application (2021-2032)

8.3.2 World Spin-on Carbon Materials Production Value by Application (2021-2032)

8.3.3 World Spin-on Carbon Materials Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Brewer Science

9.1.1 Brewer Science Details

9.1.2 Brewer Science Major Business

9.1.3 Brewer Science Spin-on Carbon Materials Product and Services

9.1.4 Brewer Science Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Brewer Science Recent Developments/Updates

9.1.6 Brewer Science Competitive Strengths & Weaknesses

9.2 Merck KGaA

9.2.1 Merck KGaA Details

9.2.2 Merck KGaA Major Business

9.2.3 Merck KGaA Spin-on Carbon Materials Product and Services

9.2.4 Merck KGaA Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Merck KGaA Recent Developments/Updates

9.2.6 Merck KGaA Competitive Strengths & Weaknesses

9.3 Samsung SDI

9.3.1 Samsung SDI Details

9.3.2 Samsung SDI Major Business

9.3.3 Samsung SDI Spin-on Carbon Materials Product and Services

9.3.4 Samsung SDI Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Samsung SDI Recent Developments/Updates

9.3.6 Samsung SDI Competitive Strengths & Weaknesses

9.4 DuPont

9.4.1 DuPont Details

9.4.2 DuPont Major Business

9.4.3 DuPont Spin-on Carbon Materials Product and Services

9.4.4 DuPont Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 DuPont Recent Developments/Updates

9.4.6 DuPont Competitive Strengths & Weaknesses

9.5 Nissan Chemical

9.5.1 Nissan Chemical Details

9.5.2 Nissan Chemical Major Business

9.5.3 Nissan Chemical Spin-on Carbon Materials Product and Services

9.5.4 Nissan Chemical Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Nissan Chemical Recent Developments/Updates

9.5.6 Nissan Chemical Competitive Strengths & Weaknesses

9.6 Honeywell

9.6.1 Honeywell Details

9.6.2 Honeywell Major Business

9.6.3 Honeywell Spin-on Carbon Materials Product and Services

9.6.4 Honeywell Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Honeywell Recent Developments/Updates

9.6.6 Honeywell Competitive Strengths & Weaknesses

9.7 Dongjin Semichem

9.7.1 Dongjin Semichem Details

9.7.2 Dongjin Semichem Major Business

9.7.3 Dongjin Semichem Spin-on Carbon Materials Product and Services

9.7.4 Dongjin Semichem Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Dongjin Semichem Recent Developments/Updates

9.7.6 Dongjin Semichem Competitive Strengths & Weaknesses

9.8 YCCHEM Co., Ltd.

9.8.1 YCCHEM Co., Ltd. Details

9.8.2 YCCHEM Co., Ltd. Major Business

9.8.3 YCCHEM Co., Ltd. Spin-on Carbon Materials Product and Services

9.8.4 YCCHEM Co., Ltd. Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 YCCHEM Co., Ltd. Recent Developments/Updates

9.8.6 YCCHEM Co., Ltd. Competitive Strengths & Weaknesses

9.9 JSR Micro

9.9.1 JSR Micro Details

9.9.2 JSR Micro Major Business

9.9.3 JSR Micro Spin-on Carbon Materials Product and Services

9.9.4 JSR Micro Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 JSR Micro Recent Developments/Updates

9.9.6 JSR Micro Competitive Strengths & Weaknesses

9.10 Irresistible Materials

9.10.1 Irresistible Materials Details

9.10.2 Irresistible Materials Major Business

9.10.3 Irresistible Materials Spin-on Carbon Materials Product and Services

9.10.4 Irresistible Materials Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.10.5 Irresistible Materials Recent Developments/Updates
- 9.10.6 Irresistible Materials Competitive Strengths & Weaknesses
- 9.11 Nano-C
 - 9.11.1 Nano-C Details
 - 9.11.2 Nano-C Major Business
 - 9.11.3 Nano-C Spin-on Carbon Materials Product and Services
 - 9.11.4 Nano-C Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Nano-C Recent Developments/Updates
 - 9.11.6 Nano-C Competitive Strengths & Weaknesses
- 9.12 DNF Co., Ltd.
 - 9.12.1 DNF Co., Ltd. Details
 - 9.12.2 DNF Co., Ltd. Major Business
 - 9.12.3 DNF Co., Ltd. Spin-on Carbon Materials Product and Services
 - 9.12.4 DNF Co., Ltd. Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 DNF Co., Ltd. Recent Developments/Updates
 - 9.12.6 DNF Co., Ltd. Competitive Strengths & Weaknesses
- 9.13 KOYJ Co., Ltd.
 - 9.13.1 KOYJ Co., Ltd. Details
 - 9.13.2 KOYJ Co., Ltd. Major Business
 - 9.13.3 KOYJ Co., Ltd. Spin-on Carbon Materials Product and Services
 - 9.13.4 KOYJ Co., Ltd. Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 KOYJ Co., Ltd. Recent Developments/Updates
 - 9.13.6 KOYJ Co., Ltd. Competitive Strengths & Weaknesses
- 9.14 Xiamen Hengkun New Materials Technology
 - 9.14.1 Xiamen Hengkun New Materials Technology Details
 - 9.14.2 Xiamen Hengkun New Materials Technology Major Business
 - 9.14.3 Xiamen Hengkun New Materials Technology Spin-on Carbon Materials Product and Services
 - 9.14.4 Xiamen Hengkun New Materials Technology Spin-on Carbon Materials Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Xiamen Hengkun New Materials Technology Recent Developments/Updates
 - 9.14.6 Xiamen Hengkun New Materials Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Spin-on Carbon Materials Industry Chain
- 10.2 Spin-on Carbon Materials Upstream Analysis
 - 10.2.1 Spin-on Carbon Materials Core Raw Materials
 - 10.2.2 Main Manufacturers of Spin-on Carbon Materials Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Spin-on Carbon Materials Production Mode
- 10.6 Spin-on Carbon Materials Procurement Model
- 10.7 Spin-on Carbon Materials Industry Sales Model and Sales Channels
 - 10.7.1 Spin-on Carbon Materials Sales Model
 - 10.7.2 Spin-on Carbon Materials Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Spin-on Carbon Materials Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Spin-on Carbon Materials Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Spin-on Carbon Materials Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Spin-on Carbon Materials Production Value Market Share by Region (2021-2026)
- Table 5. World Spin-on Carbon Materials Production Value Market Share by Region (2027-2032)
- Table 6. World Spin-on Carbon Materials Production by Region (2021-2026) & (Tons)
- Table 7. World Spin-on Carbon Materials Production by Region (2027-2032) & (Tons)
- Table 8. World Spin-on Carbon Materials Production Market Share by Region (2021-2026)
- Table 9. World Spin-on Carbon Materials Production Market Share by Region (2027-2032)
- Table 10. World Spin-on Carbon Materials Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World Spin-on Carbon Materials Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. Spin-on Carbon Materials Major Market Trends
- Table 13. World Spin-on Carbon Materials Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
- Table 14. World Spin-on Carbon Materials Consumption by Region (2021-2026) & (Tons)
- Table 15. World Spin-on Carbon Materials Consumption Forecast by Region (2027-2032) & (Tons)
- Table 16. World Spin-on Carbon Materials Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Spin-on Carbon Materials Producers in 2025
- Table 18. World Spin-on Carbon Materials Production by Manufacturer (2021-2026) & (Tons)
- Table 19. Production Market Share of Key Spin-on Carbon Materials Producers in 2025
- Table 20. World Spin-on Carbon Materials Average Price by Manufacturer (2021-2026)

& (US\$/Ton)

Table 21. Global Spin-on Carbon Materials Company Evaluation Quadrant

Table 22. World Spin-on Carbon Materials Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Spin-on Carbon Materials Production Site of Key Manufacturer

Table 24. Spin-on Carbon Materials Market: Company Product Type Footprint

Table 25. Spin-on Carbon Materials Market: Company Product Application Footprint

Table 26. Spin-on Carbon Materials Competitive Factors

Table 27. Spin-on Carbon Materials New Entrant and Capacity Expansion Plans

Table 28. Spin-on Carbon Materials Mergers & Acquisitions Activity

Table 29. United States VS China Spin-on Carbon Materials Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Spin-on Carbon Materials Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Spin-on Carbon Materials Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Spin-on Carbon Materials Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Spin-on Carbon Materials Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Spin-on Carbon Materials Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Spin-on Carbon Materials Production Market Share (2021-2026)

Table 37. China Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Spin-on Carbon Materials Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Spin-on Carbon Materials Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Spin-on Carbon Materials Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Spin-on Carbon Materials Production Market Share (2021-2026)

Table 42. Rest of World Based Spin-on Carbon Materials Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Spin-on Carbon Materials Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Spin-on Carbon Materials Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Spin-on Carbon Materials Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Spin-on Carbon Materials Production Market Share (2021-2026)

Table 47. World Spin-on Carbon Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Spin-on Carbon Materials Production by Type (2021-2026) & (Tons)

Table 49. World Spin-on Carbon Materials Production by Type (2027-2032) & (Tons)

Table 50. World Spin-on Carbon Materials Production Value by Type (2021-2026) & (USD Million)

Table 51. World Spin-on Carbon Materials Production Value by Type (2027-2032) & (USD Million)

Table 52. World Spin-on Carbon Materials Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Spin-on Carbon Materials Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Spin-on Carbon Materials Production Value by Curing Temperature, (USD Million), 2021 & 2025 & 2032

Table 55. World Spin-on Carbon Materials Production by Curing Temperature (2021-2026) & (Tons)

Table 56. World Spin-on Carbon Materials Production by Curing Temperature (2027-2032) & (Tons)

Table 57. World Spin-on Carbon Materials Production Value by Curing Temperature (2021-2026) & (USD Million)

Table 58. World Spin-on Carbon Materials Production Value by Curing Temperature (2027-2032) & (USD Million)

Table 59. World Spin-on Carbon Materials Average Price by Curing Temperature (2021-2026) & (US\$/Ton)

Table 60. World Spin-on Carbon Materials Average Price by Curing Temperature (2027-2032) & (US\$/Ton)

Table 61. World Spin-on Carbon Materials Production Value by Film Thickness, (USD Million), 2021 & 2025 & 2032

Table 62. World Spin-on Carbon Materials Production by Film Thickness (2021-2026) & (Tons)

Table 63. World Spin-on Carbon Materials Production by Film Thickness (2027-2032) &

(Tons)

Table 64. World Spin-on Carbon Materials Production Value by Film Thickness (2021-2026) & (USD Million)

Table 65. World Spin-on Carbon Materials Production Value by Film Thickness (2027-2032) & (USD Million)

Table 66. World Spin-on Carbon Materials Average Price by Film Thickness (2021-2026) & (US\$/Ton)

Table 67. World Spin-on Carbon Materials Average Price by Film Thickness (2027-2032) & (US\$/Ton)

Table 68. World Spin-on Carbon Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Spin-on Carbon Materials Production by Application (2021-2026) & (Tons)

Table 70. World Spin-on Carbon Materials Production by Application (2027-2032) & (Tons)

Table 71. World Spin-on Carbon Materials Production Value by Application (2021-2026) & (USD Million)

Table 72. World Spin-on Carbon Materials Production Value by Application (2027-2032) & (USD Million)

Table 73. World Spin-on Carbon Materials Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Spin-on Carbon Materials Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Brewer Science Basic Information, Manufacturing Base and Competitors

Table 76. Brewer Science Major Business

Table 77. Brewer Science Spin-on Carbon Materials Product and Services

Table 78. Brewer Science Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Brewer Science Recent Developments/Updates

Table 80. Brewer Science Competitive Strengths & Weaknesses

Table 81. Merck KGaA Basic Information, Manufacturing Base and Competitors

Table 82. Merck KGaA Major Business

Table 83. Merck KGaA Spin-on Carbon Materials Product and Services

Table 84. Merck KGaA Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Merck KGaA Recent Developments/Updates

Table 86. Merck KGaA Competitive Strengths & Weaknesses

Table 87. Samsung SDI Basic Information, Manufacturing Base and Competitors

Table 88. Samsung SDI Major Business
Table 89. Samsung SDI Spin-on Carbon Materials Product and Services
Table 90. Samsung SDI Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Samsung SDI Recent Developments/Updates
Table 92. Samsung SDI Competitive Strengths & Weaknesses
Table 93. DuPont Basic Information, Manufacturing Base and Competitors
Table 94. DuPont Major Business
Table 95. DuPont Spin-on Carbon Materials Product and Services
Table 96. DuPont Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. DuPont Recent Developments/Updates
Table 98. DuPont Competitive Strengths & Weaknesses
Table 99. Nissan Chemical Basic Information, Manufacturing Base and Competitors
Table 100. Nissan Chemical Major Business
Table 101. Nissan Chemical Spin-on Carbon Materials Product and Services
Table 102. Nissan Chemical Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Nissan Chemical Recent Developments/Updates
Table 104. Nissan Chemical Competitive Strengths & Weaknesses
Table 105. Honeywell Basic Information, Manufacturing Base and Competitors
Table 106. Honeywell Major Business
Table 107. Honeywell Spin-on Carbon Materials Product and Services
Table 108. Honeywell Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Honeywell Recent Developments/Updates
Table 110. Honeywell Competitive Strengths & Weaknesses
Table 111. Dongjin Semichem Basic Information, Manufacturing Base and Competitors
Table 112. Dongjin Semichem Major Business
Table 113. Dongjin Semichem Spin-on Carbon Materials Product and Services
Table 114. Dongjin Semichem Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Dongjin Semichem Recent Developments/Updates
Table 116. Dongjin Semichem Competitive Strengths & Weaknesses
Table 117. YCCHEM Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 118. YCCHEM Co., Ltd. Major Business
Table 119. YCCHEM Co., Ltd. Spin-on Carbon Materials Product and Services

Table 120. YCCHEM Co., Ltd. Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. YCCHEM Co., Ltd. Recent Developments/Updates

Table 122. YCCHEM Co., Ltd. Competitive Strengths & Weaknesses

Table 123. JSR Micro Basic Information, Manufacturing Base and Competitors

Table 124. JSR Micro Major Business

Table 125. JSR Micro Spin-on Carbon Materials Product and Services

Table 126. JSR Micro Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. JSR Micro Recent Developments/Updates

Table 128. JSR Micro Competitive Strengths & Weaknesses

Table 129. Irresistible Materials Basic Information, Manufacturing Base and Competitors

Table 130. Irresistible Materials Major Business

Table 131. Irresistible Materials Spin-on Carbon Materials Product and Services

Table 132. Irresistible Materials Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Irresistible Materials Recent Developments/Updates

Table 134. Irresistible Materials Competitive Strengths & Weaknesses

Table 135. Nano-C Basic Information, Manufacturing Base and Competitors

Table 136. Nano-C Major Business

Table 137. Nano-C Spin-on Carbon Materials Product and Services

Table 138. Nano-C Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Nano-C Recent Developments/Updates

Table 140. Nano-C Competitive Strengths & Weaknesses

Table 141. DNF Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. DNF Co., Ltd. Major Business

Table 143. DNF Co., Ltd. Spin-on Carbon Materials Product and Services

Table 144. DNF Co., Ltd. Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. DNF Co., Ltd. Recent Developments/Updates

Table 146. DNF Co., Ltd. Competitive Strengths & Weaknesses

Table 147. KOYJ Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. KOYJ Co., Ltd. Major Business

Table 149. KOYJ Co., Ltd. Spin-on Carbon Materials Product and Services

Table 150. KOYJ Co., Ltd. Spin-on Carbon Materials Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 151. KOYJ Co., Ltd. Recent Developments/Updates

Table 152. KOYJ Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Xiamen Hengkun New Materials Technology Basic Information,
Manufacturing Base and Competitors

Table 154. Xiamen Hengkun New Materials Technology Major Business

Table 155. Xiamen Hengkun New Materials Technology Spin-on Carbon Materials
Product and Services

Table 156. Xiamen Hengkun New Materials Technology Spin-on Carbon Materials
Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and
Market Share (2021-2026)

Table 157. Xiamen Hengkun New Materials Technology Recent Developments/Updates

Table 158. Xiamen Hengkun New Materials Technology Competitive Strengths &
Weaknesses

Table 159. Global Key Players of Spin-on Carbon Materials Upstream (Raw Materials)

Table 160. Global Spin-on Carbon Materials Typical Customers

Table 161. Spin-on Carbon Materials Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Spin-on Carbon Materials Picture

Figure 2. World Spin-on Carbon Materials Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Spin-on Carbon Materials Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Spin-on Carbon Materials Production (2021-2032) & (Tons)

Figure 5. World Spin-on Carbon Materials Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Spin-on Carbon Materials Production Value Market Share by Region (2021-2032)

Figure 7. World Spin-on Carbon Materials Production Market Share by Region (2021-2032)

Figure 8. North America Spin-on Carbon Materials Production (2021-2032) & (Tons)

Figure 9. Europe Spin-on Carbon Materials Production (2021-2032) & (Tons)

Figure 10. China Spin-on Carbon Materials Production (2021-2032) & (Tons)

Figure 11. Japan Spin-on Carbon Materials Production (2021-2032) & (Tons)

Figure 12. Spin-on Carbon Materials Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 15. World Spin-on Carbon Materials Consumption Market Share by Region (2021-2032)

Figure 16. United States Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 17. China Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 18. Europe Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 19. Japan Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 20. South Korea Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 22. India Spin-on Carbon Materials Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Spin-on Carbon Materials by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Spin-on Carbon Materials Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Spin-on Carbon Materials Markets in 2025

Figure 26. United States VS China: Spin-on Carbon Materials Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Spin-on Carbon Materials Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Spin-on Carbon Materials Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Spin-on Carbon Materials Production Market Share 2025

Figure 30. China Based Manufacturers Spin-on Carbon Materials Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Spin-on Carbon Materials Production Market Share 2025

Figure 32. World Spin-on Carbon Materials Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Spin-on Carbon Materials Production Value Market Share by Type in 2025

Figure 34. Polymer-based Spin-on Carbon Materials

Figure 35. Small-molecule Spin-on Carbon Materials

Figure 36. Fullerene-based Spin-on Carbon Materials

Figure 37. Others

Figure 38. World Spin-on Carbon Materials Production Market Share by Type (2021-2032)

Figure 39. World Spin-on Carbon Materials Production Value Market Share by Type (2021-2032)

Figure 40. World Spin-on Carbon Materials Average Price by Type (2021-2032) & (US\$/Ton)

Figure 41. World Spin-on Carbon Materials Production Value by Curing Temperature, (USD Million), 2021 & 2025 & 2032

Figure 42. World Spin-on Carbon Materials Production Value Market Share by Curing Temperature in 2025

Figure 43. Low-temperature Curing SOC

Figure 44. Medium-temperature Curing SOC

Figure 45. High-temperature Curing SOC

Figure 46. World Spin-on Carbon Materials Production Market Share by Curing Temperature (2021-2032)

Figure 47. World Spin-on Carbon Materials Production Value Market Share by Curing Temperature (2021-2032)

Figure 48. World Spin-on Carbon Materials Average Price by Curing Temperature (2021-2032) & (US\$/Ton)

Figure 49. World Spin-on Carbon Materials Production Value by Film Thickness, (USD Million), 2021 & 2025 & 2032

Figure 50. World Spin-on Carbon Materials Production Value Market Share by Film Thickness in 2025

Figure 51. Ultra-thin Film SOC

Figure 52. Standard-thickness SOC

Figure 53. Thick-film SOC

Figure 54. World Spin-on Carbon Materials Production Market Share by Film Thickness (2021-2032)

Figure 55. World Spin-on Carbon Materials Production Value Market Share by Film Thickness (2021-2032)

Figure 56. World Spin-on Carbon Materials Average Price by Film Thickness (2021-2032) & (US\$/Ton)

Figure 57. World Spin-on Carbon Materials Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World Spin-on Carbon Materials Production Value Market Share by Application in 2025

Figure 59. Logic Semiconductor Manufacturing

Figure 60. Memory Semiconductor Manufacturing

Figure 61. Advanced Packaging

Figure 62. Other

Figure 63. World Spin-on Carbon Materials Production Market Share by Application (2021-2032)

Figure 64. World Spin-on Carbon Materials Production Value Market Share by Application (2021-2032)

Figure 65. World Spin-on Carbon Materials Average Price by Application (2021-2032) & (US\$/Ton)

Figure 66. Spin-on Carbon Materials Industry Chain

Figure 67. Spin-on Carbon Materials Procurement Model

Figure 68. Spin-on Carbon Materials Sales Model

Figure 69. Spin-on Carbon Materials Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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