

Global Spin-On Carbon SOC Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Spin-On Carbon SOC Material market size is expected to reach \$ 349 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

In 2025, global sales volume for Spin-On Carbon (SOC) materials is projected to reach 48,000 liters, with an average price of \$3,857 per liter.

Spin-On Carbon (SOC) is an organic coating material utilized in advanced semiconductor lithography processes; it constitutes a core category within the broader class of Spin-On Hardmasks (SOH). Chemically, it consists of a solution of cross-linked aromatic polymers characterized by a high carbon content (>80%, with optimized formulations reaching up to 90%). Typically, this solution is formulated by blending poly(amic acid) resins, cross-linking agents, and organic solvents (such as PGMEA). Applied in liquid form via a spin-coating process to ensure uniform coverage across the wafer surface, SOC undergoes a high-temperature baking and curing step (ranging from 200°C to 550°C) to form a dense, amorphous carbon film. This film serves as a sacrificial layer or hardmask, playing a critical role in various semiconductor manufacturing stages, including multi-layer lithography, plasma etching, and Chemical Vapor Deposition (CVD) processes.

Spin-on carbon materials provide high transparency for improved overlay control and high thermal stability for compatibility in various integration flows. 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. In a tri-layer etch stack the bottom layer is typically thick amorphous carbon deposited by chemical vapor deposition (CVD). The challenges for CVD are high capital and running costs, particle defects, and the non-planarizing nature of the layer. According to our research?global SOC (Spin on Carbon) Hardmasks market is projected to reach US\$ 1208.7 million in 2029, increasing from US\$ 649.3 million in 2022, with the CAGR of 9.3% during the period of 2023 to 2029. Demand from Semiconductors (excl. Memory) and DRAM are the major drivers for the industry. Global key players of SOC (spin on carbon) hardmasks include Samsung SDI, Merck Group, JSR, Brewer Science, YCCEM, etc. Asia-Pacific is the largest market, followed by North America and Europe.

This report studies the global Spin-On Carbon SOC Material production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Spin-On Carbon SOC Material total production and demand, 2021-2032, (L)

Global Spin-On Carbon SOC Material total production value, 2021-2032, (USD Million)

Global Spin-On Carbon SOC Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (L), (based on production site)

Global Spin-On Carbon SOC Material consumption by region & country, CAGR, 2021-2032 & (L)

U.S. VS China: Spin-On Carbon SOC Material domestic production, consumption, key domestic manufacturers and share

Global Spin-On Carbon SOC Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (L)

Global Spin-On Carbon SOC Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (L)

Global Spin-On Carbon SOC Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (L)

This report profiles key players in the global Spin-On Carbon SOC Material 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 Samsung SDI (KR), Merck Group (DE), JSR (JP), Brewer Science (US), Shin-Etsu MicroSi (US), YCICHEM (KR), Nano-C (US), 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 SOC Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (L) and average price (US\$/L) 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 SOC Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Spin-On Carbon SOC Material Market, Segmentation by Type:

Carbon Content: 80?85%

Carbon Content: >90%

Global Spin-On Carbon SOC Material Market, Segmentation by Curing Temperature:

High Temperature

Room Temperature

Global Spin-On Carbon SOC Material Market, Segmentation by Technology Node:

Mature Nodes (28nm+)

Advanced Nodes (7?14nm)

Ultra-Advanced Nodes (3?5nm, GAA)

Global Spin-On Carbon SOC Material Market, Segmentation by Application:

Semiconductors

DRAM

NAND

LCDs

Companies Profiled:

Samsung SDI (KR)

Merck Group (DE)

JSR (JP)

Brewer Science (US)

Shin-Etsu MicroSi (US)

YCCHEM (KR)

Nano-C (US)

Key Questions Answered:

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

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