

Global Spin-on Carbon (SOC) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Spin-on Carbon (SOC) 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 (SOC) is a class of high-carbon-content semiconductor lithography materials that form organic thin films through a spin-coating process and are primarily used as carbon hardmasks, underlayers, or planarization layers in multilayer lithography stacks. SOC materials are typically formulated using high-carbon polymers, small molecules, fullerene derivatives, and specialized solvent systems, enabling the formation of uniform films with good gap-filling and surface-planarization performance. After thermal curing, the films provide enhanced mechanical stability and plasma etch resistance. In advanced semiconductor manufacturing, SOC helps improve etch selectivity and pattern fidelity during pattern transfer while providing effective planarization over complex wafer topography, making it widely used in logic devices, DRAM, 3D NAND, and other advanced semiconductor fabrication processes. In 2025, global Spin-on Carbon (SOC) production reached approximately 824 tons, with an average global market price of around 140 k USD/ton. The production capacity for Spin-on Carbon (SOC) in 2025 was approximately 1000 tons. The typical gross profit margin for Spin-on Carbon (SOC) between 20% and 40%.

The global Spin-on Carbon market is primarily driven by the advancement of semiconductor process nodes, the expanding adoption of EUV and multiple-patterning technologies, and the continued increase in 3D NAND layer counts. As semiconductor manufacturing moves toward smaller feature sizes, higher integration, and increasingly complex three-dimensional structures, conventional single-layer lithography systems face growing challenges in high-aspect-ratio etching and precise pattern transfer, accelerating the adoption of SOC as a key material in multilayer hardmask stacks.

Current demand is concentrated in advanced logic, DRAM, and 3D NAND manufacturing, with additional opportunities emerging in advanced packaging applications. Because SOC materials require high carbon content, low defectivity, excellent film uniformity, strong planarization capability, and high etch selectivity, the market is characterized by significant technical and customer qualification barriers. Going forward, continued node migration and memory capacity expansion are expected to support strong demand for high-performance SOC materials with improved etch resistance, lower defect levels, and broader process compatibility.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Spin-on Carbon (SOC) 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 (SOC) 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 (SOC) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Spin-on Carbon (SOC) 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 (SOC) Market, Segmentation by Curing Temperature:

Low-temperature Curing SOC

Medium-temperature Curing SOC

High-temperature Curing SOC

Global Spin-on Carbon (SOC) Market, Segmentation by Film Thickness:

Ultra-thin Film SOC

Standard-thickness SOC

Thick-film SOC

Global Spin-on Carbon (SOC) 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 (SOC) market?
2. What is the demand of the global Spin-on Carbon (SOC) market?
3. What is the year over year growth of the global Spin-on Carbon (SOC) market?
4. What is the production and production value of the global Spin-on Carbon (SOC) market?
5. Who are the key producers in the global Spin-on Carbon (SOC) market?
6. What are the growth factors driving the market demand?

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