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Global Block Copolymers for Lithography Market Growth 2026-2032

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Abstracts

The global Block Copolymers for Lithography market size is predicted to grow from US$ 52.83 million in 2025 to US$ 159 million in 2032; it is expected to grow at a CAGR of 17.1% from 2026 to 2032.

Block Copolymers for Lithography are high-purity functional polymers used in semiconductor and nanoscale patterning processes. Different polymer blocks are covalently linked and undergo controlled microphase separation in thin films to form periodic lamellar, cylindrical, or other nanoscale morphologies, which can be oriented and positioned through chemoepitaxy, graphoepitaxy, or related guiding processes. The market scope mainly covers PS-b-PMMA, non-silicon high-?, and silicon-containing high-? block copolymer systems used for lithographic pattern multiplication, pattern rectification, and sub-lithographic feature generation. Key purchasing and qualification parameters include natural pitch L0, interaction parameter ?, molecular weight and dispersity, block ratio, target morphology, defect density, line-edge roughness, etch contrast, annealing window, metal and ionic contamination, and lot-to-lot consistency. Demand is concentrated in advanced semiconductor patterning, nanoscale data-storage patterning, and nanofabrication research. The blended gross margin is approximately 60%.

Market Trends

Block copolymers for lithography are moving from benchmark PS-b-PMMA systems toward higher-? materials with smaller natural pitch and stronger etch contrast. As advanced nodes impose tighter requirements for low defectivity, low line-edge roughness, and faster defect annihilation, material development is shifting from simply reducing L0 toward coordinated optimization of molecular-weight distribution, block

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ratio, interfacial width, glass-transition behavior, and annealing kinetics. EUV-assisted pattern rectification and pitch multiplication are important development directions, while supply is evolving from research-grade single polymers toward high-purity formulations, stable lots, and customer-specific material windows designed for 300 mm wafer processes.

Drivers

Continued scaling in advanced logic and DRAM is increasing pressure on pattern quality, while EUV at very small features and low dose still faces stochastic defects, line-edge roughness, and local CD variation. This supports evaluation of BCP directed self-assembly as a complementary patterning route. BCPs can use molecular self-assembly to create periodic structures smaller than the guiding pattern while reusing much of the installed coating, bake, and etch infrastructure, giving the approach strong materials-driven scaling value for regular line/space and hole patterns.

Restraints

BCP performance is highly dependent on the specific underlayer, guiding surface, film thickness, and annealing conditions, while defectivity, long-range order, pattern transfer, and compatibility with non-periodic layouts remain barriers to high-volume adoption. High-? materials must balance smaller pitch with adequate chain mobility, low interfacial roughness, and strong etch selectivity. Semiconductor-grade synthesis, trace-metal control, and lot-to-lot reproducibility also increase development and manufacturing difficulty.

Opportunities

High-NA EUV and more advanced memory nodes create new validation windows for high-? BCPs with natural pitch below 20 nm. EUV line/space rectification, contact-hole regularization, local pitch multiplication, and dense memory patterning are among the more promising use cases. For suppliers, extending from polymer architecture into formulation, filtration, surface matching, and joint process development can raise value per customer and strengthen qualification stickiness.

Challenges

Long-term risks include continued improvement in High-NA EUV single-exposure capability and competition from self-aligned multipatterning and area-selective

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deposition. If BCP defect metrology, design rules, annealing throughput, and pattern-transfer windows do not become reproducible standards, commercial demand may remain concentrated in R&D and selected production modules. Long qualification cycles and frequent material iteration also require suppliers to carry significant co-development costs.

Industry Chain Analysis

Upstream inputs include high-purity styrene, methyl methacrylate and other functional monomers, polymerization initiators and terminators, high-purity solvents, and purification materials. Midstream value creation is concentrated in living or controlled polymerization, block architecture design, molecular-weight and dispersity control, ultra-high-purity processing, formulation filtration, and lot-level quality control, together with interface matching to neutral layers, guiding layers, and etch processes. Downstream demand is led by advanced semiconductor patterning, with additional use in data storage and nanofabrication research. Compared with commodity polymers, value is driven primarily by nanoscale self-assembly performance, defect control, and customer process qualification rather than raw-material cost.

Segment Insights

PS-b-PMMA remains the mature benchmark for process development and tool validation, but its relatively low ? limits further reduction in natural pitch. High-? systems carry the main scaling roadmap, with non-silicon materials preserving familiar organic-process behavior and silicon-containing systems providing stronger etch contrast for pattern transfer. By morphology, lamellar BCPs are suited to dense line/space patterns, while cylindrical systems are more relevant to holes or dot arrays. By natural pitch, products below 20 nm represent the higher technical barrier and the strongest orientation toward advanced nodes.

Downstream Market Opportunities

Semiconductors are the core commercial demand market, particularly advanced logic, DRAM, and EUV-related patterning development. Customer selection is increasingly based on defectivity, L0 stability, annealing time, line-edge roughness, and post-etch pattern fidelity rather than only the ability to self-assemble. Data storage remains compatible with highly regular dense patterns, while nanofabrication research supports early validation of new high-? systems, interface-control concepts, and novel morphologies.

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Regional Insights

Asia-Pacific combines the largest concentration of advanced wafer fabrication and memory capacity with Japan's strong lithography-material supply base, making it the largest potential demand region for lithography BCPs. North America remains influential in BCP molecular design, chip R&D, and advanced patterning ecosystems, while Europe supports joint validation of DSA with EUV and High-NA EUV through leading semiconductor research infrastructure. Regional competitiveness depends more on proximity to customer R&D lines and sustained co-development than on conventional chemical distribution coverage.

Competitive Landscape Analysis

Block copolymers for lithography form a specialized polymer market with a limited supplier base and high technical and qualification barriers. Competition centers on high-? molecular architecture, controlled polymerization, natural-pitch and morphology tuning, trace-impurity control, lot consistency, and compatibility with neutral and guiding materials. Suppliers with semiconductor-grade manufacturing, 300 mm wafer validation, and long-term customer co-development capabilities are closer to production opportunities, while research-grade polymer manufacturers primarily serve universities, research institutes, and early-stage material screening.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Block Copolymers for Lithography Industry Forecast” looks at past sales and reviews total world Block Copolymers for Lithography sales in 2025, providing a comprehensive analysis by region and market sector of projected Block Copolymers for Lithography sales for 2026 through 2032. With Block Copolymers for Lithography sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Block Copolymers for Lithography industry.

This Insight Report provides a comprehensive analysis of the global Block Copolymers for Lithography landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Block Copolymers for Lithography portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Block Copolymers for Lithography market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Block Copolymers for Lithography and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Block Copolymers for Lithography.

This report presents a comprehensive overview, market shares, and growth opportunities of Block Copolymers for Lithography market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

PS-b-PMMA Systems

Non-Silicon High-? Systems

Silicon-Containing High-? Systems

Other Systems

Segmentation by Natural Pitch:

Below 20 nm

20–30 nm

Above 30 nm

Segmentation by Target Morphology:

Lamellar

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Cylindrical

Other Morphologies

Segmentation by Polymer Architecture:

Diblock Copolymers

Triblock and Multiblock Copolymers

Blended or Gradient Block Copolymers

Others

Segmentation by Application:

Semiconductors

Data Storage

Nanofabrication Research

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Brewer Science

Arkema

Merck

Nissan Chemical

Tokyo Ohka Kogyo

Polymer Source

Key Questions Addressed in this Report

What is the 10-year outlook for the global Block Copolymers for Lithography market?

What factors are driving Block Copolymers for Lithography market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Block Copolymers for Lithography market opportunities vary by end market size?

How does Block Copolymers for Lithography break out by Type, by Application?

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