

Global Etch Hard Mask Market Growth 2025-2031

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Abstracts

The global Etch Hard Mask market size is predicted to grow from US\$ 1034 million in 2025 to US\$ 1520 million in 2031; it is expected to grow at a CAGR of 6.6% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

In the etching process, in order to etch a specific shape, a shielding layer needs to be set on the target material, and the target material under the shielding layer will not be etched. Photoresist is a traditional shielding material, but when the line width gradually decreases, thinner photoresist is needed, because if the thickness is too high, the photoresist collapse problem is very likely to occur. Therefore, it is necessary to use a thin and hard material as a shielding layer. Hard mask has high hardness, strong chemical inertness, high melting point, high etching selectivity, and a very thin thickness can be used to etch deeper target depths. Hard masks are mainly used in multiple photolithography processes. First, multiple photoresist images are transferred to the hard mask, and the final pattern is transferred to the substrate through the hard mask.

The global etch hard mask market benefits from the rapid iteration of semiconductor manufacturing technology, especially the popularization of advanced processes (below 7nm) and 3D NAND storage technology. The core demand comes from the wafer fab's requirements for high-precision patterning processes. Hard masks are indispensable in multiple exposures and high aspect ratio etching. International leading companies dominate the high-end market with material innovation. Future trends include extreme ultraviolet (EUV) compatible mask development and environmentally friendly process upgrades, but facing challenges such as high material costs, technical barriers and geopolitical supply chain fluctuations, wafer capacity expansion in the Asia-Pacific

region (especially China) may become the main growth engine.

LP Information, Inc. (LPI) ' newest research report, the “Etch Hard Mask Industry Forecast” looks at past sales and reviews total world Etch Hard Mask sales in 2024, providing a comprehensive analysis by region and market sector of projected Etch Hard Mask sales for 2025 through 2031. With Etch Hard Mask sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Etch Hard Mask industry.

This Insight Report provides a comprehensive analysis of the global Etch Hard Mask 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 Etch Hard Mask portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Etch Hard Mask market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Etch Hard Mask 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 Etch Hard Mask.

This report presents a comprehensive overview, market shares, and growth opportunities of Etch Hard Mask market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Metal Oxide Based

Carbon Based

Segmentation by Application:

Logic IC

DRAM & NAND

Power Device

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

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

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.

Samsung SDI

Merck Group

JSR

Nissan Chemical Industries

Shin-Etsu MicroSi

YCCHEM

PiBond

Brewer Science

Nano-C

Key Questions Addressed in this Report

What is the 10-year outlook for the global Etch Hard Mask market?

What factors are driving Etch Hard Mask market growth, globally and by region?

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

How do Etch Hard Mask market opportunities vary by end market size?

How does Etch Hard Mask break out by Type, by Application?

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