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Global EUV Underlayer Materials Market Growth 2026-2032

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Abstracts

The global EUV Underlayer Materials market size is predicted to grow from US$ 205 million in 2025 to US$ 679 million in 2032; it is expected to grow at a CAGR of 18.2% from 2026 to 2032.

EUV underlayer materials are functional thin films placed between EUV photoresist and the wafer substrate to improve adhesion, tune secondary-electron and energy transfer, suppress pattern collapse, reduce stochastic defects, or enhance downstream etch transfer. Platforms include organic, silicon-containing, metal-oxide, and organic-inorganic hybrid chemistries, with requirements for ultrathin uniform films, low outgassing, low metal contamination, and precise chemical compatibility with EUV resists. In 2025, global EUV Underlayer Materials production reached approximately 2,500 metric tons.

Demand for EUV underlayer materials is primarily driven by more EUV layers, thinner resist films, and tighter control of stochastic defects and pattern collapse. As advanced nodes tighten specifications for defects, trace metals, particles, film uniformity, and lot-to-lot consistency, qualification cycles become longer and supplier stickiness increases. Purification capability, formulation consistency, and joint qualification with leading fabs are therefore central competitive factors.

Future growth will also be supported by High-NA EUV, ultrathin resists, higher etch-transfer requirements, and sensitizing underlayer technologies. As logic, memory, and advanced packaging flows become more complex, both the number of material-intensive process steps and the required performance per wafer increase. Localization, supply-chain resilience, and environmental compliance will create openings for new suppliers, although scaled adoption will still depend on long-term reliability and high-

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volume manufacturing qualification.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global EUV Underlayer Materials 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 EUV Underlayer Materials portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global EUV Underlayer Materials market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for EUV Underlayer Materials 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 EUV Underlayer Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of EUV Underlayer Materials market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Organic EUV Underlayer

Silicon-Containing EUV Underlayer

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Metal-Oxide EUV Underlayer

Organic-Inorganic Hybrid Underlayer

Other

Segmentation by Primary Function:

Adhesion-Promoting Underlayer

Sensitivity-Enhancing Underlayer

Etch-Transfer Underlayer

Planarizing Underlayer

Other

Segmentation by Coating Method:

Spin-On Underlayer

Vapor-Deposited Underlayer

Dry-Film Underlayer

Other

Segmentation by Application:

EUV Logic Lithography

EUV DRAM Lithography

EUV NAND Peripheral Patterning

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High-NA EUV Lithography

Other

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

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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.

Brewer Science

Nissan Chemical

TOK

JSR

Merck

Key Questions Addressed in this Report

What is the 10-year outlook for the global EUV Underlayer Materials market?

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What factors are driving EUV Underlayer Materials market growth, globally and by region?

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

How do EUV Underlayer Materials market opportunities vary by end market size?

How does EUV Underlayer Materials break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global EUV Underlayer Materials Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for EUV Underlayer Materials by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for EUV Underlayer Materials by Country/Region, 2021, 2025 & 2032
2.2 EUV Underlayer Materials Segment by Type
  2.2.1 Organic EUV Underlayer
  2.2.2 Silicon-Containing EUV Underlayer
  2.2.3 Metal-Oxide EUV Underlayer
  2.2.4 Organic-Inorganic Hybrid Underlayer
  2.2.5 Other
  2.2.6 EUV Underlayer Materials Sales by Type
    2.2.6.1 Global EUV Underlayer Materials Sales Market Share by Type (2021-2026)
    2.2.6.2 Global EUV Underlayer Materials Revenue and Market Share by Type (2021-2026)
    2.2.6.3 Global EUV Underlayer Materials Sale Price by Type (2021-2026)
2.3 EUV Underlayer Materials Segment by Primary Function
  2.3.1 Adhesion-Promoting Underlayer
  2.3.2 Sensitivity-Enhancing Underlayer
  2.3.3 Etch-Transfer Underlayer
  2.3.4 Planarizing Underlayer
  2.3.5 Other
  2.3.6 EUV Underlayer Materials Sales by Primary Function

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2.3.6.1 Global EUV Underlayer Materials Sales Market Share by Primary Function (2021-2026)
2.3.6.2 Global EUV Underlayer Materials Revenue and Market Share by Primary Function (2021-2026)
2.3.6.3 Global EUV Underlayer Materials Sale Price by Primary Function (2021-2026)
2.4 EUV Underlayer Materials Segment by Coating Method
2.4.1 Spin-On Underlayer
2.4.2 Vapor-Deposited Underlayer
2.4.3 Dry-Film Underlayer
2.4.4 Other
2.4.5 EUV Underlayer Materials Sales by Coating Method
2.4.5.1 Global EUV Underlayer Materials Sales Market Share by Coating Method (2021-2026)
2.4.5.2 Global EUV Underlayer Materials Revenue and Market Share by Coating Method (2021-2026)
2.4.5.3 Global EUV Underlayer Materials Sale Price by Coating Method (2021-2026)
2.5 EUV Underlayer Materials Segment by Application
2.5.1 EUV Logic Lithography
2.5.2 EUV DRAM Lithography
2.5.3 EUV NAND Peripheral Patterning
2.5.4 High-NA EUV Lithography
2.5.5 Other
2.5.6 EUV Underlayer Materials Sales by Application
2.5.6.1 Global EUV Underlayer Materials Sale Market Share by Application (2021-2026)
2.5.6.2 Global EUV Underlayer Materials Revenue and Market Share by Application (2021-2026)
2.5.6.3 Global EUV Underlayer Materials Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global EUV Underlayer Materials Breakdown Data by Company
3.1.1 Global EUV Underlayer Materials Annual Sales by Company (2021-2026)
3.1.2 Global EUV Underlayer Materials Sales Market Share by Company (2021-2026)
3.2 Global EUV Underlayer Materials Annual Revenue by Company (2021-2026)
3.2.1 Global EUV Underlayer Materials Revenue by Company (2021-2026)
3.2.2 Global EUV Underlayer Materials Revenue Market Share by Company (2021-2026)
3.3 Global EUV Underlayer Materials Sale Price by Company

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3.4 Key Manufacturers EUV Underlayer Materials Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers EUV Underlayer Materials Product Location Distribution
3.4.2 Players EUV Underlayer Materials Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR EUV UNDERLAYER MATERIALS BY GEOGRAPHIC REGION

4.1 World Historic EUV Underlayer Materials Market Size by Geographic Region (2021-2026)
4.1.1 Global EUV Underlayer Materials Annual Sales by Geographic Region (2021-2026)
4.1.2 Global EUV Underlayer Materials Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic EUV Underlayer Materials Market Size by Country/Region (2021-2026)
4.2.1 Global EUV Underlayer Materials Annual Sales by Country/Region (2021-2026)
4.2.2 Global EUV Underlayer Materials Annual Revenue by Country/Region (2021-2026)
4.3 Americas EUV Underlayer Materials Sales Growth
4.4 APAC EUV Underlayer Materials Sales Growth
4.5 Europe EUV Underlayer Materials Sales Growth
4.6 Middle East & Africa EUV Underlayer Materials Sales Growth

5 AMERICAS

5.1 Americas EUV Underlayer Materials Sales by Country
5.1.1 Americas EUV Underlayer Materials Sales by Country (2021-2026)
5.1.2 Americas EUV Underlayer Materials Revenue by Country (2021-2026)
5.2 Americas EUV Underlayer Materials Sales by Type (2021-2026)
5.3 Americas EUV Underlayer Materials Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico

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5.7 Brazil

6 APAC

6.1 APAC EUV Underlayer Materials Sales by Region
  6.1.1 APAC EUV Underlayer Materials Sales by Region (2021-2026)
  6.1.2 APAC EUV Underlayer Materials Revenue by Region (2021-2026)
6.2 APAC EUV Underlayer Materials Sales by Type (2021-2026)
6.3 APAC EUV Underlayer Materials Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe EUV Underlayer Materials by Country
  7.1.1 Europe EUV Underlayer Materials Sales by Country (2021-2026)
  7.1.2 Europe EUV Underlayer Materials Revenue by Country (2021-2026)
7.2 Europe EUV Underlayer Materials Sales by Type (2021-2026)
7.3 Europe EUV Underlayer Materials Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa EUV Underlayer Materials by Country
  8.1.1 Middle East & Africa EUV Underlayer Materials Sales by Country (2021-2026)
  8.1.2 Middle East & Africa EUV Underlayer Materials Revenue by Country (2021-2026)
8.2 Middle East & Africa EUV Underlayer Materials Sales by Type (2021-2026)
8.3 Middle East & Africa EUV Underlayer Materials Sales by Application (2021-2026)
8.4 Egypt

+357 96 030922
info@marketpublishers.com

8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of EUV Underlayer Materials
10.3 Manufacturing Process Analysis of EUV Underlayer Materials
10.4 Industry Chain Structure of EUV Underlayer Materials

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 EUV Underlayer Materials Distributors
11.3 EUV Underlayer Materials Customer

12 WORLD FORECAST REVIEW FOR EUV UNDERLAYER MATERIALS BY GEOGRAPHIC REGION

12.1 Global EUV Underlayer Materials Market Size Forecast by Region
  12.1.1 Global EUV Underlayer Materials Forecast by Region (2027-2032)
  12.1.2 Global EUV Underlayer Materials Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global EUV Underlayer Materials Forecast by Type (2027-2032)
12.7 Global EUV Underlayer Materials Forecast by Application (2027-2032)

+357 96 030922
info@marketpublishers.com

13 KEY PLAYERS ANALYSIS

13.1 Brewer Science
13.1.1 Brewer Science Company Information
13.1.2 Brewer Science EUV Underlayer Materials Product Portfolios and Specifications
13.1.3 Brewer Science EUV Underlayer Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Brewer Science Main Business Overview
13.1.5 Brewer Science Latest Developments
13.2 Nissan Chemical
13.2.1 Nissan Chemical Company Information
13.2.2 Nissan Chemical EUV Underlayer Materials Product Portfolios and Specifications
13.2.3 Nissan Chemical EUV Underlayer Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Nissan Chemical Main Business Overview
13.2.5 Nissan Chemical Latest Developments
13.3 TOK
13.3.1 TOK Company Information
13.3.2 TOK EUV Underlayer Materials Product Portfolios and Specifications
13.3.3 TOK EUV Underlayer Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 TOK Main Business Overview
13.3.5 TOK Latest Developments
13.4 JSR
13.4.1 JSR Company Information
13.4.2 JSR EUV Underlayer Materials Product Portfolios and Specifications
13.4.3 JSR EUV Underlayer Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 JSR Main Business Overview
13.4.5 JSR Latest Developments
13.5 Merck
13.5.1 Merck Company Information
13.5.2 Merck EUV Underlayer Materials Product Portfolios and Specifications
13.5.3 Merck EUV Underlayer Materials Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Merck Main Business Overview

+357 96 030922
info@marketpublishers.com

13.5.5 Merck Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. EUV Underlayer Materials Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. EUV Underlayer Materials Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Organic EUV Underlayer
Table 4. Major Players of Silicon-Containing EUV Underlayer
Table 5. Major Players of Metal-Oxide EUV Underlayer
Table 6. Major Players of Organic-Inorganic Hybrid Underlayer
Table 7. Major Players of Other
Table 8. Global EUV Underlayer Materials Sales by Type (2021-2026) & (Kilotons)
Table 9. Global EUV Underlayer Materials Sales Market Share by Type (2021-2026)
Table 10. Global EUV Underlayer Materials Revenue by Type (2021-2026) & ($ million)
Table 11. Global EUV Underlayer Materials Revenue Market Share by Type (2021-2026)
Table 12. Global EUV Underlayer Materials Sale Price by Type (2021-2026) & (US$/Kg)
Table 13. Major Players of Adhesion-Promoting Underlayer
Table 14. Major Players of Sensitivity-Enhancing Underlayer
Table 15. Major Players of Etch-Transfer Underlayer
Table 16. Major Players of Planarizing Underlayer
Table 17. Major Players of Other
Table 18. Global EUV Underlayer Materials Sales by Primary Function (2021-2026) & (Kilotons)
Table 19. Global EUV Underlayer Materials Sales Market Share by Primary Function (2021-2026)
Table 20. Global EUV Underlayer Materials Revenue by Primary Function (2021-2026) & ($ million)
Table 21. Global EUV Underlayer Materials Revenue Market Share by Primary Function (2021-2026)
Table 22. Global EUV Underlayer Materials Sale Price by Primary Function (2021-2026) & (US$/Kg)
Table 23. Major Players of Spin-On Underlayer
Table 24. Major Players of Vapor-Deposited Underlayer
Table 25. Major Players of Dry-Film Underlayer
Table 26. Major Players of Other
Table 27. Global EUV Underlayer Materials Sales by Coating Method (2021-2026) &

+357 96 030922
info@marketpublishers.com

(Kilotons)
Table 28. Global EUV Underlayer Materials Sales Market Share by Coating Method (2021-2026)
Table 29. Global EUV Underlayer Materials Revenue by Coating Method (2021-2026) & ($ million)
Table 30. Global EUV Underlayer Materials Revenue Market Share by Coating Method (2021-2026)
Table 31. Global EUV Underlayer Materials Sale Price by Coating Method (2021-2026) & (US$/Kg)
Table 32. Global EUV Underlayer Materials Sale by Application (2021-2026) & (Kilotons)
Table 33. Global EUV Underlayer Materials Sale Market Share by Application (2021-2026)
Table 34. Global EUV Underlayer Materials Revenue by Application (2021-2026) & ($ million)
Table 35. Global EUV Underlayer Materials Revenue Market Share by Application (2021-2026)
Table 36. Global EUV Underlayer Materials Sale Price by Application (2021-2026) & (US$/Kg)
Table 37. Global EUV Underlayer Materials Sales by Company (2021-2026) & (Kilotons)
Table 38. Global EUV Underlayer Materials Sales Market Share by Company (2021-2026)
Table 39. Global EUV Underlayer Materials Revenue by Company (2021-2026) & ($ millions)
Table 40. Global EUV Underlayer Materials Revenue Market Share by Company (2021-2026)
Table 41. Global EUV Underlayer Materials Sale Price by Company (2021-2026) & (US$/Kg)
Table 42. Key Manufacturers EUV Underlayer Materials Producing Area Distribution and Sales Area
Table 43. Players EUV Underlayer Materials Products Offered
Table 44. EUV Underlayer Materials Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 45. New Products and Potential Entrants
Table 46. Market M&A Activity & Strategy
Table 47. Global EUV Underlayer Materials Sales by Geographic Region (2021-2026) & (Kilotons)
Table 48. Global EUV Underlayer Materials Sales Market Share Geographic Region

+357 96 030922
info@marketpublishers.com

(2021-2026)
Table 49. Global EUV Underlayer Materials Revenue by Geographic Region (2021-2026) & ($ millions)
Table 50. Global EUV Underlayer Materials Revenue Market Share by Geographic Region (2021-2026)
Table 51. Global EUV Underlayer Materials Sales by Country/Region (2021-2026) & (Kilotons)
Table 52. Global EUV Underlayer Materials Sales Market Share by Country/Region (2021-2026)
Table 53. Global EUV Underlayer Materials Revenue by Country/Region (2021-2026) & ($ millions)
Table 54. Global EUV Underlayer Materials Revenue Market Share by Country/Region (2021-2026)
Table 55. Americas EUV Underlayer Materials Sales by Country (2021-2026) & (Kilotons)
Table 56. Americas EUV Underlayer Materials Sales Market Share by Country (2021-2026)
Table 57. Americas EUV Underlayer Materials Revenue by Country (2021-2026) & ($ millions)
Table 58. Americas EUV Underlayer Materials Sales by Type (2021-2026) & (Kilotons)
Table 59. Americas EUV Underlayer Materials Sales by Application (2021-2026) & (Kilotons)
Table 60. APAC EUV Underlayer Materials Sales by Region (2021-2026) & (Kilotons)
Table 61. APAC EUV Underlayer Materials Sales Market Share by Region (2021-2026)
Table 62. APAC EUV Underlayer Materials Revenue by Region (2021-2026) & ($ millions)
Table 63. APAC EUV Underlayer Materials Sales by Type (2021-2026) & (Kilotons)
Table 64. APAC EUV Underlayer Materials Sales by Application (2021-2026) & (Kilotons)
Table 65. Europe EUV Underlayer Materials Sales by Country (2021-2026) & (Kilotons)
Table 66. Europe EUV Underlayer Materials Revenue by Country (2021-2026) & ($ millions)
Table 67. Europe EUV Underlayer Materials Sales by Type (2021-2026) & (Kilotons)
Table 68. Europe EUV Underlayer Materials Sales by Application (2021-2026) & (Kilotons)
Table 69. Middle East & Africa EUV Underlayer Materials Sales by Country (2021-2026) & (Kilotons)
Table 70. Middle East & Africa EUV Underlayer Materials Revenue Market Share by Country (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 71. Middle East & Africa EUV Underlayer Materials Sales by Type (2021-2026) & (Kilotons)
Table 72. Middle East & Africa EUV Underlayer Materials Sales by Application (2021-2026) & (Kilotons)
Table 73. Key Market Drivers & Growth Opportunities of EUV Underlayer Materials
Table 74. Key Market Challenges & Risks of EUV Underlayer Materials
Table 75. Key Industry Trends of EUV Underlayer Materials
Table 76. EUV Underlayer Materials Raw Material
Table 77. Key Suppliers of Raw Materials
Table 78. EUV Underlayer Materials Distributors List
Table 79. EUV Underlayer Materials Customer List
Table 80. Global EUV Underlayer Materials Sales Forecast by Region (2027-2032) & (Kilotons)
Table 81. Global EUV Underlayer Materials Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Americas EUV Underlayer Materials Sales Forecast by Country (2027-2032) & (Kilotons)
Table 83. Americas EUV Underlayer Materials Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. APAC EUV Underlayer Materials Sales Forecast by Region (2027-2032) & (Kilotons)
Table 85. APAC EUV Underlayer Materials Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 86. Europe EUV Underlayer Materials Sales Forecast by Country (2027-2032) & (Kilotons)
Table 87. Europe EUV Underlayer Materials Revenue Forecast by Country (2027-2032) & ($ millions)
Table 88. Middle East & Africa EUV Underlayer Materials Sales Forecast by Country (2027-2032) & (Kilotons)
Table 89. Middle East & Africa EUV Underlayer Materials Revenue Forecast by Country (2027-2032) & ($ millions)
Table 90. Global EUV Underlayer Materials Sales Forecast by Type (2027-2032) & (Kilotons)
Table 91. Global EUV Underlayer Materials Revenue Forecast by Type (2027-2032) & ($ millions)
Table 92. Global EUV Underlayer Materials Sales Forecast by Application (2027-2032) & (Kilotons)
Table 93. Global EUV Underlayer Materials Revenue Forecast by Application (2027-2032) & ($ millions)

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info@marketpublishers.com

Table 94. Brewer Science Basic Information, EUV Underlayer Materials Manufacturing Base, Sales Area and Its Competitors
Table 95. Brewer Science EUV Underlayer Materials Product Portfolios and Specifications
Table 96. Brewer Science EUV Underlayer Materials Sales (Kilotons), Revenue ($ Million), Price (US$/Kg) and Gross Margin (2021-2026)
Table 97. Brewer Science Main Business
Table 98. Brewer Science Latest Developments
Table 99. Nissan Chemical Basic Information, EUV Underlayer Materials Manufacturing Base, Sales Area and Its Competitors
Table 100. Nissan Chemical EUV Underlayer Materials Product Portfolios and Specifications
Table 101. Nissan Chemical EUV Underlayer Materials Sales (Kilotons), Revenue ($ Million), Price (US$/Kg) and Gross Margin (2021-2026)
Table 102. Nissan Chemical Main Business
Table 103. Nissan Chemical Latest Developments
Table 104. TOK Basic Information, EUV Underlayer Materials Manufacturing Base, Sales Area and Its Competitors
Table 105. TOK EUV Underlayer Materials Product Portfolios and Specifications
Table 106. TOK EUV Underlayer Materials Sales (Kilotons), Revenue ($ Million), Price (US$/Kg) and Gross Margin (2021-2026)
Table 107. TOK Main Business
Table 108. TOK Latest Developments
Table 109. JSR Basic Information, EUV Underlayer Materials Manufacturing Base, Sales Area and Its Competitors
Table 110. JSR EUV Underlayer Materials Product Portfolios and Specifications
Table 111. JSR EUV Underlayer Materials Sales (Kilotons), Revenue ($ Million), Price (US$/Kg) and Gross Margin (2021-2026)
Table 112. JSR Main Business
Table 113. JSR Latest Developments
Table 114. Merck Basic Information, EUV Underlayer Materials Manufacturing Base, Sales Area and Its Competitors
Table 115. Merck EUV Underlayer Materials Product Portfolios and Specifications
Table 116. Merck EUV Underlayer Materials Sales (Kilotons), Revenue ($ Million), Price (US$/Kg) and Gross Margin (2021-2026)
Table 117. Merck Main Business
Table 118. Merck Latest Developments

+357 96 030922
info@marketpublishers.com

List Of Figures

LIST OF FIGURES

Figure 1. Picture of EUV Underlayer Materials
Figure 2. EUV Underlayer Materials Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global EUV Underlayer Materials Sales Growth Rate 2021-2032 (Kilotons)
Figure 7. Global EUV Underlayer Materials Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. EUV Underlayer Materials Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. EUV Underlayer Materials Sales Market Share by Country/Region (2025)
Figure 10. EUV Underlayer Materials Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Organic EUV Underlayer
Figure 12. Product Picture of Silicon-Containing EUV Underlayer
Figure 13. Product Picture of Metal-Oxide EUV Underlayer
Figure 14. Product Picture of Organic-Inorganic Hybrid Underlayer
Figure 15. Product Picture of Other
Figure 16. Global EUV Underlayer Materials Sales Market Share by Type in 2026
Figure 17. Global EUV Underlayer Materials Revenue Market Share by Type (2021-2026)
Figure 18. Product Picture of Adhesion-Promoting Underlayer
Figure 19. Product Picture of Sensitivity-Enhancing Underlayer
Figure 20. Product Picture of Etch-Transfer Underlayer
Figure 21. Product Picture of Planarizing Underlayer
Figure 22. Product Picture of Other
Figure 23. Global EUV Underlayer Materials Sales Market Share by Primary Function in 2026
Figure 24. Global EUV Underlayer Materials Revenue Market Share by Primary Function (2021-2026)
Figure 25. Product Picture of Spin-On Underlayer
Figure 26. Product Picture of Vapor-Deposited Underlayer
Figure 27. Product Picture of Dry-Film Underlayer
Figure 28. Product Picture of Other
Figure 29. Global EUV Underlayer Materials Sales Market Share by Coating Method in

+357 96 030922
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2026
Figure 30. Global EUV Underlayer Materials Revenue Market Share by Coating Method (2021-2026)
Figure 31. EUV Underlayer Materials Consumed in EUV Logic Lithography
Figure 32. Global EUV Underlayer Materials Market: EUV Logic Lithography (2021-2026) & (Kilotons)
Figure 33. EUV Underlayer Materials Consumed in EUV DRAM Lithography
Figure 34. Global EUV Underlayer Materials Market: EUV DRAM Lithography (2021-2026) & (Kilotons)
Figure 35. EUV Underlayer Materials Consumed in EUV NAND Peripheral Patterning
Figure 36. Global EUV Underlayer Materials Market: EUV NAND Peripheral Patterning (2021-2026) & (Kilotons)
Figure 37. EUV Underlayer Materials Consumed in High-NA EUV Lithography
Figure 38. Global EUV Underlayer Materials Market: High-NA EUV Lithography (2021-2026) & (Kilotons)
Figure 39. EUV Underlayer Materials Consumed in Other
Figure 40. Global EUV Underlayer Materials Market: Other (2021-2026) & (Kilotons)
Figure 41. Global EUV Underlayer Materials Sale Market Share by Application (2025)
Figure 42. Global EUV Underlayer Materials Revenue Market Share by Application in 2025
Figure 43. EUV Underlayer Materials Sales by Company in 2025 (Kilotons)
Figure 44. Global EUV Underlayer Materials Sales Market Share by Company in 2025
Figure 45. EUV Underlayer Materials Revenue by Company in 2025 ($ millions)
Figure 46. Global EUV Underlayer Materials Revenue Market Share by Company in 2025
Figure 47. Global EUV Underlayer Materials Sales Market Share by Geographic Region (2021-2026)
Figure 48. Global EUV Underlayer Materials Revenue Market Share by Geographic Region in 2025
Figure 49. Americas EUV Underlayer Materials Sales 2021-2026 (Kilotons)
Figure 50. Americas EUV Underlayer Materials Revenue 2021-2026 ($ millions)
Figure 51. APAC EUV Underlayer Materials Sales 2021-2026 (Kilotons)
Figure 52. APAC EUV Underlayer Materials Revenue 2021-2026 ($ millions)
Figure 53. Europe EUV Underlayer Materials Sales 2021-2026 (Kilotons)
Figure 54. Europe EUV Underlayer Materials Revenue 2021-2026 ($ millions)
Figure 55. Middle East & Africa EUV Underlayer Materials Sales 2021-2026 (Kilotons)
Figure 56. Middle East & Africa EUV Underlayer Materials Revenue 2021-2026 ($ millions)
Figure 57. Americas EUV Underlayer Materials Sales Market Share by Country in 2025

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Figure 58. Americas EUV Underlayer Materials Revenue Market Share by Country (2021-2026)
Figure 59. Americas EUV Underlayer Materials Sales Market Share by Type (2021-2026)
Figure 60. Americas EUV Underlayer Materials Sales Market Share by Application (2021-2026)
Figure 61. United States EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 62. Canada EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 63. Mexico EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 64. Brazil EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 65. APAC EUV Underlayer Materials Sales Market Share by Region in 2025
Figure 66. APAC EUV Underlayer Materials Revenue Market Share by Region (2021-2026)
Figure 67. APAC EUV Underlayer Materials Sales Market Share by Type (2021-2026)
Figure 68. APAC EUV Underlayer Materials Sales Market Share by Application (2021-2026)
Figure 69. China EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 70. Japan EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 71. South Korea EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 72. Southeast Asia EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 73. India EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 74. Australia EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 75. China Taiwan EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 76. Europe EUV Underlayer Materials Sales Market Share by Country in 2025
Figure 77. Europe EUV Underlayer Materials Revenue Market Share by Country (2021-2026)
Figure 78. Europe EUV Underlayer Materials Sales Market Share by Type (2021-2026)
Figure 79. Europe EUV Underlayer Materials Sales Market Share by Application (2021-2026)
Figure 80. Germany EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 81. France EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 82. UK EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 83. Italy EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 84. Russia EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 85. Middle East & Africa EUV Underlayer Materials Sales Market Share by

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Country (2021-2026)
Figure 86. Middle East & Africa EUV Underlayer Materials Sales Market Share by Type (2021-2026)
Figure 87. Middle East & Africa EUV Underlayer Materials Sales Market Share by Application (2021-2026)
Figure 88. Egypt EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 89. South Africa EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 90. Israel EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 91. Turkey EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 92. GCC Countries EUV Underlayer Materials Revenue Growth 2021-2026 ($ millions)
Figure 93. Manufacturing Cost Structure Analysis of EUV Underlayer Materials in 2026
Figure 94. Manufacturing Process Analysis of EUV Underlayer Materials
Figure 95. Industry Chain Structure of EUV Underlayer Materials
Figure 96. Channels of Distribution
Figure 97. Global EUV Underlayer Materials Sales Market Forecast by Region (2027-2032)
Figure 98. Global EUV Underlayer Materials Revenue Market Share Forecast by Region (2027-2032)
Figure 99. Global EUV Underlayer Materials Sales Market Share Forecast by Type (2027-2032)
Figure 100. Global EUV Underlayer Materials Revenue Market Share Forecast by Type (2027-2032)
Figure 101. Global EUV Underlayer Materials Sales Market Share Forecast by Application (2027-2032)
Figure 102. Global EUV Underlayer Materials Revenue Market Share Forecast by Application (2027-2032)

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