

# Global Hard Mask Material Market Growth 2025-2031

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## Abstracts

The global Hard Mask Material market size is predicted to grow from US\$ 1660 million in 2025 to US\$ 3916 million in 2031; it is expected to grow at a CAGR of 15.4% 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.

A hardmask is a material used in semiconductor processing as an etch mask instead of a polymer or other organic 'soft' resist material.

Global key hard mask material players include Samsung SDI, JSR, Merck Group etc. The top 3 companies hold a share about 80%. Asia-Pacific is the largest market, with a share about 70%, followed by North America and Europe with the share about 15% and 10%.

### Market Driver:

The use of multilayer hardmasks is now essential for the semiconductor industry to produce devices at ever shrinking dimensions, particularly given recent developments in device architecture, such as FinFET and Intel tri-gate devices.

Novel SOC materials enable increased aspect ratio 3D device architectures. Indeed, high resolution, high aspect ratio SOC hardmasks will not only benefit semiconductors, they hold the potential to boost nanofabrication capabilities across many markets and applications.

### Market Challenge:

The current spin-on approach is to use aromatic polymers for the SOC together with a silicon rich spin-on-glass to form the bottom two layers of the stack. For instance, a Novolac: Hydrogen Silsesquioxane bilayer has achieved 40 nm half-pitch with an aspect ratio of 3.25:1 and isolated 40 nm lines with an aspect ratio of 20:1. However, distortion, (“wiggling”) of the features in the thick carbon layer during the final fluorine silicon etch step, is a significant problem at smaller feature sizes. It is believed that the aliphatic hydrocarbon content of SOC, and particularly the presence of hydrogen, is responsible for this unwanted effect, and there has been a drive towards even more aromatic polymers based on e.g., polycyclic aromatics such as naphthalene and anthracene.

At present, the market competition is becoming increasingly fierce, and the enterprise products will face the risk of falling market prices. Whereas volatility in the raw material prices is anticipated to prove a major restraining factor for the market growth over the forecast period.

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

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

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

This report presents a comprehensive overview, market shares, and growth

opportunities of Hard Mask Material market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Organic Hard Mask Material

Inorganic Hard Mask Material

Segmentation by Application:

CVD

Spin Coating Process

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

JSR

Merck Group

Nissan Chemical Industries

Shin-Etsu MicroSi

YCCHEM

PiBond

### Key Questions Addressed in this Report

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

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

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

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

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

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