

Global M8 Grade Hydrocarbon Resin Market Growth 2026-2032

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Abstracts

The global M8 Grade Hydrocarbon Resin market size is predicted to grow from US\$ 61.63 million in 2025 to US\$ 861 million in 2032; it is expected to grow at a CAGR of 28.0% from 2026 to 2032.

M8 Grade Hydrocarbon Resin (PCH) refers to a specialty hydrocarbon resin designed to meet the high-frequency & high-speed signal transmission requirements of PCBs/CCLs in AI servers & high-speed network equipment. It is a saturated or unsaturated polymer composed of carbon & hydrogen atoms. Its molecular structure features low polarity, high bond energy, and low polarizability, which gives it excellent dielectric properties ($D_k \approx 2.5$, $D_f \approx 0.003$ at 10GHz), low moisture absorption, and high thermal stability. Unlike commodity hydrocarbon resins (C5/C9) used in rubber, adhesives, and coatings, M8 Grade Hydrocarbon Resin is a high-end, electronic-grade material and a critical component in the industry's transition from M7 to M9-grade CCL. It is typically based on a hydrogenated hydrocarbon resin system, sometimes blended with modified polyphenylene oxide (PPO/PPE) or epoxy, and is characterized by complex manufacturing processes, high entry barriers due to lengthy certifications, and extremely stringent batch-to-batch stability requirements.

M8 Grade Hydrocarbon Resin is one of the least visible but most critical 'bottleneck' materials in the AI server supply chain. Its value lies not in the market size itself (~USD 63M in 2025, ~USD 200M in 2026), but in its role as the enabler for CCL to transition from M7 to M8/M9, which ultimately determines how fast AI chips can signal. Pricing: true M8-grade hydrocarbon resin trades at around USD 100,000/ton – far higher than M6/M7 grades (USD 20,000–30,000/ton) but far below the >USD 1,000,000/ton rumored online. The latter refers to specialty M9-grade BCB resin, monopolized by SABIC, Asahi Kasei, Nippon Steel, with extremely small volumes. Margins diverge

significantly: domestic resin makers (Dongcai, Shengguan) see 15-25% gross margins due to early-stage capacity ramping and certification; Taiwanese CCL manufacturers (EMC, TUC, ITEQ) capture 25-35% via direct ties to NVIDIA/AMD; foreign monopolists (SABIC, Asahi Kasei) may enjoy >50%. Downstream primary applications: AI server motherboards & OAMs consume ~70% of M8 resin; 800G Ethernet switches ~20%; the rest for backplanes and optical module substrates. Incremental demand is almost entirely driven by AI cluster expansion – each NVIDIA H100/B100 server requires ~0.7 m² of M8-grade CCL, and 2026 AI server shipments are expected to double to 3 million units, pulling resin demand from 6,300 tons to 16,800 tons. Upstream-downstream structure is short and concentrated: resin synthesis (Dongcai, Shengguan, Shijiazhuang Chengzhi) – CCL (EMC, TUC, ITEQ, Shengyi) – PCB (Shennan, Wus) – AI server OEMs. Certification barriers are extremely high – CCL makers must be qualified by end AI chip customers, and resin makers must then be qualified by CCL makers, a 1-2 year process. Landscape is a two-layer structure: foreign oligopolists (SABIC, Asahi Kasei, Nippon Steel) dominate ultra-low-loss M9 and above; domestic players (Dongcai, Shengguan) are catching up at M8 and below, with significant capacity expansion in 2026 (Dongcai's 3,500 ton line on stream mid-2026). Taiwanese CCL makers hold ~70% of global AI server CCL share, making them the critical channel for resin suppliers. Uncertainties include: (1) technology roadmap risk – a shift away from hydrocarbon/PPO blends (e.g., to fluorinated resins) could alter demand; (2) capacity ramp-up speed – domestic resin capacity is planned large, but actual yield and pace remain unproven; (3) geopolitics – AI chip export controls may indirectly impact global resin supply chains. Conclusion: M8 hydrocarbon resin is a classic AI-compute amplifier material – its market growth is driven purely by AI server volume, not by its own technological breakthroughs. The structural features are high certification barriers, strong customer lock-in, and a widening supply-demand gap. In the short term, the biggest opportunity for domestic resin makers is not to challenge the M9 monopoly, but to achieve a replaceable and reliable supply at the M8 level, securing an indispensable position in the domestic AI hardware supply chain.

LP Information, Inc. (LPI)'s newest research report, the "M8 Grade Hydrocarbon Resin Industry Forecast" looks at past sales and reviews total world M8 Grade Hydrocarbon Resin sales in 2025, providing a comprehensive analysis by region and market sector of projected M8 Grade Hydrocarbon Resin sales for 2026 through 2032. With M8 Grade Hydrocarbon Resin sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world M8 Grade Hydrocarbon Resin industry.

This Insight Report provides a comprehensive analysis of the global M8 Grade

Hydrocarbon Resin 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 M8 Grade Hydrocarbon Resin portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global M8 Grade Hydrocarbon Resin market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for M8 Grade Hydrocarbon Resin 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 M8 Grade Hydrocarbon Resin.

This report presents a comprehensive overview, market shares, and growth opportunities of M8 Grade Hydrocarbon Resin market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Standard Grade (Unhydrogenated) (Df 0.0020?0.0025)

Hydrogenated Grade (Fully Saturated) (Df 0.0015?0.0020)

High-Purity Hydrogenated Grade (Df

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