

Global M9 Grade ODV Hydrocarbon Resin Market Growth 2026-2032

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Abstracts

The global M9 Grade ODV Hydrocarbon Resin market size is predicted to grow from US\$ 20.74 million in 2025 to US\$ 464 million in 2032; it is expected to grow at a CAGR of 41.1% from 2026 to 2032.

M9 Grade ODV Hydrocarbon Resin refers to specialty hydrocarbon resin used in M9 grade copper clad laminate. ODV (multi-functional vinyl aromatic copolymer developed by Nippon Steel Chemical & Material Co., Ltd.) represents one of the most representative technology routes among M9 grade hydrocarbon resins, alongside BCB (benzocyclobutene) and EX (acenaphthylene). M9 grade hydrocarbon resin is a carbon-hydrogen polymer chain containing no polar groups, capable of reducing dissipation factor (Df) to approximately 0.0005, meeting the stringent ultra-low loss requirements of M9 CCL. The core value of ODV resin lies in its extremely low dielectric loss (Df

M9 ODV hydrocarbon resin is the core material for NVIDIA's next-generation Rubin AI server platform. Its value lies not in market size, but in enabling the transition from M8 to M9 PCBs that support 112G/224G PAM4 signaling. Technical barriers are extremely high: ODV (multi-functional vinyl aromatic copolymer) demands ultra-low polarity, narrow molecular weight distribution, and sub-ppm impurity control, making synthesis and purification far more difficult than M8-grade resins. Globally, Nippon Steel Chemical & Material, as the originator and long-time monopolist of ODV technology, dominates the high-end market through decades of process know-how and patent walls. Among domestic challengers, Dongcai Technology has achieved mass production and is the exclusive resin supplier for NVIDIA's Rubin architecture; Shengguan Group has small-batch shipments of ODV-route resin; Shijiazhuang Chengzhi Yonghua, Meilian New Materials, and Tongyu New Materials are at certification or early-stage mass production. Pricing: due to scarcity and capacity

constraints, ODV resin trades at USD 500,000-700,000/ton, far above M8 grade (~USD 100,000/ton). Margins are highly uneven: Nippon Steel enjoys monopolistic margins (likely >50%); Dongcai, as the exclusive NVIDIA supplier with tight capacity, may see gross margin rise from ~20% to above 30%; other domestic players are still losing money or barely break-even. Supply-demand gap is severe: global effective capacity of M9-grade hydrocarbon resins (ODV, BCB, etc.) is only ~3,000 tons in 2026, while demand from just the Rubin platform exceeds 5,000 tons. Downstream applications are almost entirely in AI compute clusters: Rubin OAM accelerator cards (7-layer M9 HDI) and UBB backplanes (26-layer M9 through-hole) absorb most of the output, with small volumes for 1.6T switches and optical modules. The value chain is short and specialised: resin makers → CCL manufacturers (EMC, Doosan, Shengyi) → PCB makers (Wus, Unimicron) → end customers like NVIDIA. Certification barriers are extremely high and exclusive: entering NVIDIA's supply chain requires 2-3 years of rigorous validation; once qualified, suppliers are locked in with high switching costs. Landscape: ODV route shows a 'one superpower, multiple challengers' pattern → Nippon Steel is the superpower, Dongcai is the strongest challenger, and others form the second tier. Uncertainties include technology substitution risk (BCB, modified PPO), capacity ramp-up (Dongcai's new 3,500-ton line), and geopolitics affecting high-end material exports. Conclusion: M9 ODV hydrocarbon resin is one of the most critical and scarcest links in the domestic AI hardware supply chain. Its core driver is the rigid demand for ultra-low loss PCBs driven by NVIDIA's Rubin platform mass production. Structural features are extreme technical barriers, long certification cycles, a widening supply-demand gap, and nascent domestic substitution. In the short term, Nippon Steel will maintain its high-end monopoly, but domestic players like Dongcai are poised to gain share in 2026-2027 through capacity release and exclusive supply status.

LP Information, Inc. (LPI) ' newest research report, the 'M9 Grade ODV Hydrocarbon Resin Industry Forecast' looks at past sales and reviews total world M9 Grade ODV Hydrocarbon Resin sales in 2025, providing a comprehensive analysis by region and market sector of projected M9 Grade ODV Hydrocarbon Resin sales for 2026 through 2032. With M9 Grade ODV Hydrocarbon Resin sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world M9 Grade ODV Hydrocarbon Resin industry.

This Insight Report provides a comprehensive analysis of the global M9 Grade ODV 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 M9 Grade ODV Hydrocarbon Resin portfolios and capabilities, market entry

strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global M9 Grade ODV Hydrocarbon Resin market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for M9 Grade ODV 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 M9 Grade ODV Hydrocarbon Resin.

This report presents a comprehensive overview, market shares, and growth opportunities of M9 Grade ODV Hydrocarbon Resin market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Standard M9 (Df ≤ 0.0015 , Dk 2.8 ± 0.3)

Ultra-low Loss M9 (Df ≤ 0.0010 , Dk 2.6 ± 0.2)

Extreme-low Loss M9 (Df ≤ 0.0005 , Dk 2.4 ± 0.2)

Segmentation by Function:

High-Speed Differential Pair Dielectric

Build-up Layer Dielectric

Core & Prepreg for Thick Backplane

Antenna Integration Layer

Segmentation by Application:

Rubin Platform OAM

Rubin Platform UBB

1.6T Switch PCB

Optical Module Substrate (800G/1.6T)

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.

Nippon Steel Chemical & Material

Dongcai Technology

Shengguan Group

Shijiazhuang Chengzhi Yonghua (Saimo Technology)

Meilian New Materials

Tongyu New Materials

SABIC (Specialties)

Key Questions Addressed in this Report

What is the 10-year outlook for the global M9 Grade ODV Hydrocarbon Resin market?

What factors are driving M9 Grade ODV Hydrocarbon Resin market growth, globally and by region?

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

How do M9 Grade ODV Hydrocarbon Resin market opportunities vary by end market size?

How does M9 Grade ODV Hydrocarbon Resin break out by Type, by Application?

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