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Global Metal Oxide EUV Photoresists Market Growth 2026-2032

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Abstracts

The global Metal Oxide EUV Photoresists market size is predicted to grow from US$ 58.70 million in 2025 to US$ 201 million in 2032; it is expected to grow at a CAGR of 19.1% from 2026 to 2032.

Metal oxide EUV photoresists are advanced resist materials that use metal-oxygen frameworks, metal oxide clusters, or organometallic oxides as the core photosensitive units for 13.5 nm extreme ultraviolet lithography. EUV exposure induces ligand cleavage, crosslinking, condensation, or other solubility changes to form high-resolution resist patterns, typically combining strong EUV absorption, thin-film processability, and high etch resistance. This scope includes spin-on and vapor-deposited metal oxide EUV photoresists, while excluding conventional polymer chemically amplified EUV resists, general EUV underlayers, and non-photosensitive metal oxide hard masks. The estimated blended gross margin is approximately 55%.

Continued scaling in advanced logic and the rising number of EUV layers in DRAM are pushing foundries and IDMs to accelerate evaluation of metal oxide resists. High-NA EUV further increases the value of MOR platforms by demanding thinner films, lower stochastic defectivity, and higher photon efficiency than conventional chemically amplified resists.

Product development is centered on tin-based metal oxide systems, positive-tone processing, lower exposure dose, reduced line-edge roughness, and defect control, while suppliers also pursue low-/high-NA compatibility, lower PFAS content, and tighter integration between spin-on and dry process flows. Commercial supply remains concentrated, with qualification barriers built around formulation chemistry, development systems, filtration, and process integration.

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Demand is concentrated in Asia's leading-edge wafer manufacturing hubs, while advanced-node capacity expansion in North America is increasing local material qualification activity. Opportunities come from high-NA production adoption, broader EUV use in DRAM, and supply-chain localization; key risks include long customer qualification cycles, metal contamination and defect control, process-window sensitivity, and continued competition from chemically amplified and dry resist platforms.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Metal Oxide EUV Photoresists 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 Metal Oxide EUV Photoresists.

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

Market Segmentation

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Segmentation by Type:

Tin-Based Metal Oxide Resists

Hafnium-Based Metal Oxide Resists

Zirconium-Based Metal Oxide Resists

Other Metal Oxide Resists

Segmentation by Development Tone:

Negative-Tone Metal Oxide Resists

Positive-Tone Metal Oxide Resists

Segmentation by Film Formation Method:

Spin-On Metal Oxide Resists

Vapor-Deposited Metal Oxide Resists

Segmentation by EUV Platform:

Low-NA EUV Resists

High-NA EUV Resists

Low-/High-NA Compatible EUV Resists

Segmentation by Application:

Pure-Play Foundries

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Integrated Device Manufacturers

Semiconductor R&D

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

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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.

Inpria

Tokyo Ohka Kogyo

Shin-Etsu Chemical

Dongjin Semichem

Samsung SDI

Key Questions Addressed in this Report

What is the 10-year outlook for the global Metal Oxide EUV Photoresists market?

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What factors are driving Metal Oxide EUV Photoresists market growth, globally and by region?

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

How do Metal Oxide EUV Photoresists market opportunities vary by end market size?

How does Metal Oxide EUV Photoresists break out by Type, by Application?

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