

# Global Spin-on Carbon (SoC) Hardmask Material Market Growth 2026-2032

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## Abstracts

The global Spin-on Carbon (SoC) Hardmask Material market size is predicted to grow from US\$ 773 million in 2025 to US\$ 1437 million in 2032; it is expected to grow at a CAGR of 9.4% from 2026 to 2032.

Spin-on carbon (SOC) hardmasks are an increasingly key component of the micro-chip fabrication process. They are frequently used to improve the resists' selectivity to silicon during plasma etching. Spin-on hardmask materials are widely adopted as sacrificial layers to enable pattern transfer at high resolution and act as etch stopping layer or memory layer in multiple patterning technologies. Compared with typical CVD processes for thin film formation, spin-on materials offer superior gap-fill and planarization performance.

Spin-on carbon materials provide high transparency for improved overlay control and high thermal stability for compatibility in various integration flows. Spin-on carbon (SOC) hardmasks are an increasingly key component of the micro-chip fabrication process. They are frequently used to improve the resists' selectivity to silicon during plasma etching. Furthermore, as chip architectures become increasingly complex the use of hardmasks to improve the aspect ratio of features in silicon is critical. In this context, the 'aspect ratio' is the ratio between the height of a feature on a silicon wafer and its width. For many emerging multi-layer chip architectures, such as tri-layer etch-stacks, a large height to width ratio is required to maintain small lateral features across multiple vertical layers. In a tri-layer etch stack the bottom layer is typically thick amorphous carbon deposited by chemical vapor deposition (CVD). The challenges for CVD are high capital and running costs, particle defects, and the non-planarizing nature of the layer. According to our research, global SOC (Spin on Carbon) Hardmasks market is projected to reach US\$ 1208.7 million in 2029, increasing from US\$ 649.3 million in

2022, with the CAGR of 9.3% during the period of 2023 to 2029. Demand from Semiconductors (excl. Memory) and DRAM are the major drivers for the industry. Global key players of SOC (spin on carbon) hardmasks include Samsung SDI, Merck Group, JSR, Brewer Science, YCCHM, etc. Asia-Pacific is the largest market, followed by North America and Europe.

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

This Insight Report provides a comprehensive analysis of the global Spin-on Carbon (SoC) Hardmask 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 Spin-on Carbon (SoC) Hardmask Material portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Spin-on Carbon (SoC) Hardmask Material market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Spin-on Carbon (SoC) Hardmask 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 Spin-on Carbon (SoC) Hardmask Material.

This report presents a comprehensive overview, market shares, and growth opportunities of Spin-on Carbon (SoC) Hardmask Material market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Thermoplastic Polymer

PGMEA or Cyclohexanone

Segmentation by Application:

Semiconductors

DRAM

NAND

LCDs

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

Merck Group

JSR

Brewer Science

Shin-Etsu MicroSi

YCCHEM

Nano-C

Irresistible Materials

NISSAN

### Key Questions Addressed in this Report

What is the 10-year outlook for the global Spin-on Carbon (SoC) Hardmask Material market?

What factors are driving Spin-on Carbon (SoC) Hardmask Material market growth, globally and by region?

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

How do Spin-on Carbon (SoC) Hardmask Material market opportunities vary by end market size?

How does Spin-on Carbon (SoC) Hardmask Material break out by Type, by Application?

## 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 Spin-on Carbon (SoC) Hardmask Material Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Spin-on Carbon (SoC) Hardmask Material by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Spin-on Carbon (SoC) Hardmask Material by Country/Region, 2021, 2025 & 2032

#### 2.2 Spin-on Carbon (SoC) Hardmask Material Segment by Type

- 2.2.1 Thermoplastic Polymer
- 2.2.2 PGMEA or Cyclohexanone
- 2.2.3 Spin-on Carbon (SoC) Hardmask Material Sales by Type
  - 2.2.3.1 Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)
  - 2.2.3.2 Global Spin-on Carbon (SoC) Hardmask Material Revenue and Market Share by Type (2021-2026)
  - 2.2.3.3 Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Type (2021-2026)

#### 2.3 Spin-on Carbon (SoC) Hardmask Material Segment by Application

- 2.3.1 Semiconductors
- 2.3.2 DRAM
- 2.3.3 NAND
- 2.3.4 LCDs
- 2.3.5 Spin-on Carbon (SoC) Hardmask Material Sales by Application
  - 2.3.5.1 Global Spin-on Carbon (SoC) Hardmask Material Sale Market Share by Application (2021-2026)

2.3.5.2 Global Spin-on Carbon (SoC) Hardmask Material Revenue and Market Share by Application (2021-2026)

2.3.5.3 Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Application (2021-2026)

### **3 GLOBAL BY COMPANY**

3.1 Global Spin-on Carbon (SoC) Hardmask Material Breakdown Data by Company

3.1.1 Global Spin-on Carbon (SoC) Hardmask Material Annual Sales by Company (2021-2026)

3.1.2 Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Company (2021-2026)

3.2 Global Spin-on Carbon (SoC) Hardmask Material Annual Revenue by Company (2021-2026)

3.2.1 Global Spin-on Carbon (SoC) Hardmask Material Revenue by Company (2021-2026)

3.2.2 Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Company (2021-2026)

3.3 Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Company

3.4 Key Manufacturers Spin-on Carbon (SoC) Hardmask Material Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Spin-on Carbon (SoC) Hardmask Material Product Location Distribution

3.4.2 Players Spin-on Carbon (SoC) Hardmask Material 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 SPIN-ON CARBON (SOC) HARDMASK MATERIAL BY GEOGRAPHIC REGION**

4.1 World Historic Spin-on Carbon (SoC) Hardmask Material Market Size by Geographic Region (2021-2026)

4.1.1 Global Spin-on Carbon (SoC) Hardmask Material Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Spin-on Carbon (SoC) Hardmask Material Annual Revenue by Geographic Region (2021-2026)

- 4.2 World Historic Spin-on Carbon (SoC) Hardmask Material Market Size by Country/Region (2021-2026)
  - 4.2.1 Global Spin-on Carbon (SoC) Hardmask Material Annual Sales by Country/Region (2021-2026)
  - 4.2.2 Global Spin-on Carbon (SoC) Hardmask Material Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Spin-on Carbon (SoC) Hardmask Material Sales Growth
- 4.4 APAC Spin-on Carbon (SoC) Hardmask Material Sales Growth
- 4.5 Europe Spin-on Carbon (SoC) Hardmask Material Sales Growth
- 4.6 Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales Growth

## **5 AMERICAS**

- 5.1 Americas Spin-on Carbon (SoC) Hardmask Material Sales by Country
  - 5.1.1 Americas Spin-on Carbon (SoC) Hardmask Material Sales by Country (2021-2026)
  - 5.1.2 Americas Spin-on Carbon (SoC) Hardmask Material Revenue by Country (2021-2026)
- 5.2 Americas Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026)
- 5.3 Americas Spin-on Carbon (SoC) Hardmask Material Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC Spin-on Carbon (SoC) Hardmask Material Sales by Region
  - 6.1.1 APAC Spin-on Carbon (SoC) Hardmask Material Sales by Region (2021-2026)
  - 6.1.2 APAC Spin-on Carbon (SoC) Hardmask Material Revenue by Region (2021-2026)
- 6.2 APAC Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026)
- 6.3 APAC Spin-on Carbon (SoC) Hardmask Material 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 Spin-on Carbon (SoC) Hardmask Material by Country

7.1.1 Europe Spin-on Carbon (SoC) Hardmask Material Sales by Country (2021-2026)

7.1.2 Europe Spin-on Carbon (SoC) Hardmask Material Revenue by Country  
(2021-2026)

7.2 Europe Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026)

7.3 Europe Spin-on Carbon (SoC) Hardmask Material 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 Spin-on Carbon (SoC) Hardmask Material by Country

8.1.1 Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Country  
(2021-2026)

8.1.2 Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Revenue by  
Country (2021-2026)

8.2 Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Type  
(2021-2026)

8.3 Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Application  
(2021-2026)

8.4 Egypt

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 Spin-on Carbon (SoC) Hardmask Material

10.3 Manufacturing Process Analysis of Spin-on Carbon (SoC) Hardmask Material

10.4 Industry Chain Structure of Spin-on Carbon (SoC) Hardmask Material

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Spin-on Carbon (SoC) Hardmask Material Distributors

11.3 Spin-on Carbon (SoC) Hardmask Material Customer

## **12 WORLD FORECAST REVIEW FOR SPIN-ON CARBON (SOC) HARDMASK MATERIAL BY GEOGRAPHIC REGION**

12.1 Global Spin-on Carbon (SoC) Hardmask Material Market Size Forecast by Region

12.1.1 Global Spin-on Carbon (SoC) Hardmask Material Forecast by Region (2027-2032)

12.1.2 Global Spin-on Carbon (SoC) Hardmask Material 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 Spin-on Carbon (SoC) Hardmask Material Forecast by Type (2027-2032)

12.7 Global Spin-on Carbon (SoC) Hardmask Material Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

13.1 Samsung SDI

13.1.1 Samsung SDI Company Information

13.1.2 Samsung SDI Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.1.3 Samsung SDI Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Samsung SDI Main Business Overview

13.1.5 Samsung SDI Latest Developments

13.2 Merck Group

13.2.1 Merck Group Company Information

13.2.2 Merck Group Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.2.3 Merck Group Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Merck Group Main Business Overview

13.2.5 Merck Group Latest Developments

13.3 JSR

13.3.1 JSR Company Information

13.3.2 JSR Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.3.3 JSR Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 JSR Main Business Overview

13.3.5 JSR Latest Developments

13.4 Brewer Science

13.4.1 Brewer Science Company Information

13.4.2 Brewer Science Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.4.3 Brewer Science Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Brewer Science Main Business Overview

13.4.5 Brewer Science Latest Developments

13.5 Shin-Etsu MicroSi

13.5.1 Shin-Etsu MicroSi Company Information

13.5.2 Shin-Etsu MicroSi Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.5.3 Shin-Etsu MicroSi Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Shin-Etsu MicroSi Main Business Overview

13.5.5 Shin-Etsu MicroSi Latest Developments

13.6 YCCHEM

13.6.1 YCCHEM Company Information

13.6.2 YCCHEM Spin-on Carbon (SoC) Hardmask Material Product Portfolios and

## Specifications

13.6.3 YCCHEM Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 YCCHEM Main Business Overview

13.6.5 YCCHEM Latest Developments

## 13.7 Nano-C

13.7.1 Nano-C Company Information

13.7.2 Nano-C Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.7.3 Nano-C Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Nano-C Main Business Overview

13.7.5 Nano-C Latest Developments

## 13.8 Irresistible Materials

13.8.1 Irresistible Materials Company Information

13.8.2 Irresistible Materials Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.8.3 Irresistible Materials Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Irresistible Materials Main Business Overview

13.8.5 Irresistible Materials Latest Developments

## 13.9 NISSAN

13.9.1 NISSAN Company Information

13.9.2 NISSAN Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

13.9.3 NISSAN Spin-on Carbon (SoC) Hardmask Material Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 NISSAN Main Business Overview

13.9.5 NISSAN Latest Developments

## 14 RESEARCH FINDINGS AND CONCLUSION

## List Of Tables

### LIST OF TABLES

- Table 1. Spin-on Carbon (SoC) Hardmask Material Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Spin-on Carbon (SoC) Hardmask Material Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Thermoplastic Polymer
- Table 4. Major Players of PGMEA or Cyclohexanone
- Table 5. Global Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026) & (Tons)
- Table 6. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)
- Table 7. Global Spin-on Carbon (SoC) Hardmask Material Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Type (2021-2026)
- Table 9. Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Type (2021-2026) & (US\$/Ton)
- Table 10. Global Spin-on Carbon (SoC) Hardmask Material Sale by Application (2021-2026) & (Tons)
- Table 11. Global Spin-on Carbon (SoC) Hardmask Material Sale Market Share by Application (2021-2026)
- Table 12. Global Spin-on Carbon (SoC) Hardmask Material Revenue by Application (2021-2026) & (\$ million)
- Table 13. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Application (2021-2026)
- Table 14. Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Application (2021-2026) & (US\$/Ton)
- Table 15. Global Spin-on Carbon (SoC) Hardmask Material Sales by Company (2021-2026) & (Tons)
- Table 16. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Company (2021-2026)
- Table 17. Global Spin-on Carbon (SoC) Hardmask Material Revenue by Company (2021-2026) & (\$ millions)
- Table 18. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Company (2021-2026)
- Table 19. Global Spin-on Carbon (SoC) Hardmask Material Sale Price by Company

(2021-2026) & (US\$/Ton)

Table 20. Key Manufacturers Spin-on Carbon (SoC) Hardmask Material Producing Area Distribution and Sales Area

Table 21. Players Spin-on Carbon (SoC) Hardmask Material Products Offered

Table 22. Spin-on Carbon (SoC) Hardmask Material Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 23. New Products and Potential Entrants

Table 24. Market M&A Activity & Strategy

Table 25. Global Spin-on Carbon (SoC) Hardmask Material Sales by Geographic Region (2021-2026) & (Tons)

Table 26. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share Geographic Region (2021-2026)

Table 27. Global Spin-on Carbon (SoC) Hardmask Material Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 28. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Geographic Region (2021-2026)

Table 29. Global Spin-on Carbon (SoC) Hardmask Material Sales by Country/Region (2021-2026) & (Tons)

Table 30. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country/Region (2021-2026)

Table 31. Global Spin-on Carbon (SoC) Hardmask Material Revenue by Country/Region (2021-2026) & (\$ millions)

Table 32. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Country/Region (2021-2026)

Table 33. Americas Spin-on Carbon (SoC) Hardmask Material Sales by Country (2021-2026) & (Tons)

Table 34. Americas Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country (2021-2026)

Table 35. Americas Spin-on Carbon (SoC) Hardmask Material Revenue by Country (2021-2026) & (\$ millions)

Table 36. Americas Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026) & (Tons)

Table 37. Americas Spin-on Carbon (SoC) Hardmask Material Sales by Application (2021-2026) & (Tons)

Table 38. APAC Spin-on Carbon (SoC) Hardmask Material Sales by Region (2021-2026) & (Tons)

Table 39. APAC Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Region (2021-2026)

Table 40. APAC Spin-on Carbon (SoC) Hardmask Material Revenue by Region

(2021-2026) & (\$ millions)

Table 41. APAC Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026) & (Tons)

Table 42. APAC Spin-on Carbon (SoC) Hardmask Material Sales by Application (2021-2026) & (Tons)

Table 43. Europe Spin-on Carbon (SoC) Hardmask Material Sales by Country (2021-2026) & (Tons)

Table 44. Europe Spin-on Carbon (SoC) Hardmask Material Revenue by Country (2021-2026) & (\$ millions)

Table 45. Europe Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026) & (Tons)

Table 46. Europe Spin-on Carbon (SoC) Hardmask Material Sales by Application (2021-2026) & (Tons)

Table 47. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Country (2021-2026) & (Tons)

Table 48. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Country (2021-2026)

Table 49. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Type (2021-2026) & (Tons)

Table 50. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales by Application (2021-2026) & (Tons)

Table 51. Key Market Drivers & Growth Opportunities of Spin-on Carbon (SoC) Hardmask Material

Table 52. Key Market Challenges & Risks of Spin-on Carbon (SoC) Hardmask Material

Table 53. Key Industry Trends of Spin-on Carbon (SoC) Hardmask Material

Table 54. Spin-on Carbon (SoC) Hardmask Material Raw Material

Table 55. Key Suppliers of Raw Materials

Table 56. Spin-on Carbon (SoC) Hardmask Material Distributors List

Table 57. Spin-on Carbon (SoC) Hardmask Material Customer List

Table 58. Global Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Region (2027-2032) & (Tons)

Table 59. Global Spin-on Carbon (SoC) Hardmask Material Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 60. Americas Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Country (2027-2032) & (Tons)

Table 61. Americas Spin-on Carbon (SoC) Hardmask Material Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 62. APAC Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Region (2027-2032) & (Tons)

Table 63. APAC Spin-on Carbon (SoC) Hardmask Material Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 64. Europe Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Country (2027-2032) & (Tons)

Table 65. Europe Spin-on Carbon (SoC) Hardmask Material Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 66. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Country (2027-2032) & (Tons)

Table 67. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 68. Global Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Type (2027-2032) & (Tons)

Table 69. Global Spin-on Carbon (SoC) Hardmask Material Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 70. Global Spin-on Carbon (SoC) Hardmask Material Sales Forecast by Application (2027-2032) & (Tons)

Table 71. Global Spin-on Carbon (SoC) Hardmask Material Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 72. Samsung SDI Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 73. Samsung SDI Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 74. Samsung SDI Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 75. Samsung SDI Main Business

Table 76. Samsung SDI Latest Developments

Table 77. Merck Group Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 78. Merck Group Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 79. Merck Group Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 80. Merck Group Main Business

Table 81. Merck Group Latest Developments

Table 82. JSR Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 83. JSR Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 84. JSR Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$

Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 85. JSR Main Business

Table 86. JSR Latest Developments

Table 87. Brewer Science Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 88. Brewer Science Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 89. Brewer Science Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 90. Brewer Science Main Business

Table 91. Brewer Science Latest Developments

Table 92. Shin-Etsu MicroSi Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 93. Shin-Etsu MicroSi Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 94. Shin-Etsu MicroSi Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 95. Shin-Etsu MicroSi Main Business

Table 96. Shin-Etsu MicroSi Latest Developments

Table 97. YCCHEM Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 98. YCCHEM Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 99. YCCHEM Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 100. YCCHEM Main Business

Table 101. YCCHEM Latest Developments

Table 102. Nano-C Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 103. Nano-C Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 104. Nano-C Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 105. Nano-C Main Business

Table 106. Nano-C Latest Developments

Table 107. Irresistible Materials Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 108. Irresistible Materials Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 109. Irresistible Materials Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 110. Irresistible Materials Main Business

Table 111. Irresistible Materials Latest Developments

Table 112. NISSAN Basic Information, Spin-on Carbon (SoC) Hardmask Material Manufacturing Base, Sales Area and Its Competitors

Table 113. NISSAN Spin-on Carbon (SoC) Hardmask Material Product Portfolios and Specifications

Table 114. NISSAN Spin-on Carbon (SoC) Hardmask Material Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 115. NISSAN Main Business

Table 116. NISSAN Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Spin-on Carbon (SoC) Hardmask Material
- Figure 2. Spin-on Carbon (SoC) Hardmask Material Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Spin-on Carbon (SoC) Hardmask Material Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Spin-on Carbon (SoC) Hardmask Material Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Spin-on Carbon (SoC) Hardmask Material Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country/Region (2025)
- Figure 10. Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Thermoplastic Polymer
- Figure 12. Product Picture of PGMEA or Cyclohexanone
- Figure 13. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type in 2026
- Figure 14. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Type (2021-2026)
- Figure 15. Spin-on Carbon (SoC) Hardmask Material Consumed in Semiconductors
- Figure 16. Global Spin-on Carbon (SoC) Hardmask Material Market: Semiconductors (2021-2026) & (Tons)
- Figure 17. Spin-on Carbon (SoC) Hardmask Material Consumed in DRAM
- Figure 18. Global Spin-on Carbon (SoC) Hardmask Material Market: DRAM (2021-2026) & (Tons)
- Figure 19. Spin-on Carbon (SoC) Hardmask Material Consumed in NAND
- Figure 20. Global Spin-on Carbon (SoC) Hardmask Material Market: NAND (2021-2026) & (Tons)
- Figure 21. Spin-on Carbon (SoC) Hardmask Material Consumed in LCDs
- Figure 22. Global Spin-on Carbon (SoC) Hardmask Material Market: LCDs (2021-2026) & (Tons)
- Figure 23. Global Spin-on Carbon (SoC) Hardmask Material Sale Market Share by Application (2025)

- Figure 24. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Application in 2026
- Figure 25. Spin-on Carbon (SoC) Hardmask Material Sales by Company in 2026 (Tons)
- Figure 26. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Company in 2026
- Figure 27. Spin-on Carbon (SoC) Hardmask Material Revenue by Company in 2026 (\$ millions)
- Figure 28. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Company in 2026
- Figure 29. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Geographic Region (2021-2026)
- Figure 30. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Geographic Region in 2026
- Figure 31. Americas Spin-on Carbon (SoC) Hardmask Material Sales 2021-2026 (Tons)
- Figure 32. Americas Spin-on Carbon (SoC) Hardmask Material Revenue 2021-2026 (\$ millions)
- Figure 33. APAC Spin-on Carbon (SoC) Hardmask Material Sales 2021-2026 (Tons)
- Figure 34. APAC Spin-on Carbon (SoC) Hardmask Material Revenue 2021-2026 (\$ millions)
- Figure 35. Europe Spin-on Carbon (SoC) Hardmask Material Sales 2021-2026 (Tons)
- Figure 36. Europe Spin-on Carbon (SoC) Hardmask Material Revenue 2021-2026 (\$ millions)
- Figure 37. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales 2021-2026 (Tons)
- Figure 38. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Revenue 2021-2026 (\$ millions)
- Figure 39. Americas Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country in 2026
- Figure 40. Americas Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Country (2021-2026)
- Figure 41. Americas Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)
- Figure 42. Americas Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Application (2021-2026)
- Figure 43. United States Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)
- Figure 44. Canada Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)
- Figure 45. Mexico Spin-on Carbon (SoC) Hardmask Material Revenue Growth

2021-2026 (\$ millions)

Figure 46. Brazil Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 47. APAC Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Region in 2026

Figure 48. APAC Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Region (2021-2026)

Figure 49. APAC Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)

Figure 50. APAC Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Application (2021-2026)

Figure 51. China Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 52. Japan Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 53. South Korea Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 54. Southeast Asia Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 55. India Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 56. Australia Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 57. China Taiwan Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 58. Europe Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country in 2026

Figure 59. Europe Spin-on Carbon (SoC) Hardmask Material Revenue Market Share by Country (2021-2026)

Figure 60. Europe Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)

Figure 61. Europe Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Application (2021-2026)

Figure 62. Germany Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 63. France Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 64. UK Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 65. Italy Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 66. Russia Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 67. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Country (2021-2026)

Figure 68. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Type (2021-2026)

Figure 69. Middle East & Africa Spin-on Carbon (SoC) Hardmask Material Sales Market Share by Application (2021-2026)

Figure 70. Egypt Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 71. South Africa Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 72. Israel Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 73. Turkey Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 74. GCC Countries Spin-on Carbon (SoC) Hardmask Material Revenue Growth 2021-2026 (\$ millions)

Figure 75. Manufacturing Cost Structure Analysis of Spin-on Carbon (SoC) Hardmask Material in 2026

Figure 76. Manufacturing Process Analysis of Spin-on Carbon (SoC) Hardmask Material

Figure 77. Industry Chain Structure of Spin-on Carbon (SoC) Hardmask Material

Figure 78. Channels of Distribution

Figure 79. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Forecast by Region (2027-2032)

Figure 80. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share Forecast by Region (2027-2032)

Figure 81. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share Forecast by Type (2027-2032)

Figure 82. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share Forecast by Type (2027-2032)

Figure 83. Global Spin-on Carbon (SoC) Hardmask Material Sales Market Share Forecast by Application (2027-2032)

Figure 84. Global Spin-on Carbon (SoC) Hardmask Material Revenue Market Share Forecast by Application (2027-2032)

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