

Spin on Carbon Market by Type (Hot-Temperature Spin on Carbon, Normal-temperature Spin on Carbon), Application (Logic Devices, Memory Devices, Power Devices, Photonics, Advanced Packaging), End User and Region - Global Forecast to 2028

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Abstracts

The spin on carbon market is projected to grow from USD 199 million in 2023 to USD 747 million by 2028, registering a CAGR of 30.2% during the forecast period. Some of the major factors driving the growth of the spin on carbon market include the rapid technological advancements in semiconductor manufacturing and increasing complexity of integrated circuits. However, technical challenges associated with the SOC materials act as a challenge for the market in the future. The major growth opportunity for the market players is advanced memory development for next generation memory devices.

'Market for integrated device manufacturers (IDMs) & outsourced semiconductor assembly and test (OSAT) will have the highest CAGR during the forecast period.'

The integrated device manufacturers (IDMs) & outsourced semiconductor assembly and test (OSAT) segment of the spin on carbon market is expected to witness the highest CAGR during the forecast period. The increasing development of semiconductor devices by using lithography process is acting as driver for the spin on carbon material as it is crucial for various stages of the semiconductor manufacturing process. Further, the increasing strategic initiatives such as partnership, product development from semiconductor assembly and testing providers such as ASE Group, Amkor, Micron Technology, Inc., among others acting as a driver for the market.

'Advanced Packaging expected to register the highest CAGR during the forecast period.'

The spin on carbon market's advanced packaging segment is expected to account for the highest CAGR in the forecast period. These advanced packaging techniques are designed to enhance the performance, functionality, and form factor of semiconductor devices, allowing for increased integration, improved electrical performance, and higher reliability. Some key advanced packaging applications include: System-in-Package (SiP), 3D Packaging, Wafer-Level Packaging (WLP), and others. Spin-on carbon materials provide effective dielectric insulation and passivation layers within advanced packaging solutions, enabling the reliable isolation and protection of semiconductor components. With the rapid growth in the advanced packaging technologies, specifically fan out wafer level packaging, along with increase in demand for smartphones and devices and Internet of Things (IoT) the demand for spin on carbon material is also increasing, which in turn drives the market growth.

'Asia Pacific to account for the highest market share among other regions during the forecast period.'

Asia Pacific is expected to dominate the spin on carbon market during the forecast period. China, Taiwan, South Korea, and Japan are the major contributors to the spin on carbon market in this region. Moreover, governments and industry stakeholders in the Asia-Pacific region are making substantial investments in semiconductor infrastructure and manufacturing facilities to strengthen the region's position in the global semiconductor market. These investments create opportunities for the adoption of advanced semiconductor materials such as spin on carbon, contributing to the growth and expansion of the market in the region.

In determining and verifying the market size for several segments and subsegments gathered through extensive secondary research, primary interviews have been conducted with key industry experts in the spin on carbon market.

The break-up of primary participants for the report has been shown below:

By company type: Tier 1 - 38%, Tier 2 - 28%, and Tier 3 - 34%

By designation: C-Level Executives - 40%, Managers - 30%, and Others - 30%

By region: North America - 35%, Europe - 20%, Asia Pacific - 35%, and RoW - 10%

The report profiles key players in the spin on carbon market with their respective market ranking analyses. Prominent players profiled in this report include Samsung SDI Co., Ltd. (South Korea), Merck KGaA (Germany), Shin-Etsu Chemical Co., Ltd. (Japan), YCCHEM Co., Ltd. (South Korea), Brewer Science, Inc. (US), JSR Micro, Inc. (US), KOYJ Co., Ltd. (South Korea), Irresistible Materials Ltd (UK), Nano-C (US), and DNF Co., Ltd. (South Korea) among others.

Research Coverage

This research report categorizes the spin on carbon market based on type, application, end user, and region. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the spin on carbon market and forecasts the same till 2028. The report also consists of leadership mapping and analysis of companies in the spin on carbon ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall spin on carbon market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (rapid technological advancements in semiconductor manufacturing and increasing complexity of integrated circuits, increasing demand for advanced packaging solutions, and expansion of EUV (extreme ultraviolet) lithography in memory manufacturing), restraints (competitive substitution materials), opportunities (continued miniaturization of electronic devices and continued miniaturization of electronic devices), and challenges (technical challenges associated with the SOC materials) influencing the growth of the spin on carbon market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the spin on carbon market

Market Development: Comprehensive information about lucrative markets – the report analyses the spin on carbon market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the spin on carbon market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product/service offerings of leading players like Samsung SDI Co., Ltd. (South Korea), Merck KGaA (Germany), Shin-Etsu Chemical Co., Ltd. (Japan), and YCCHEM Co., Ltd. (South Korea), among others in the spin on carbon market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS AND EXCLUSIONS

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 SPIN ON CARBON MARKET SEGMENTATION

1.3.2 REGIONAL SCOPE

1.3.3 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

1.5 LIMITATIONS

1.6 STAKEHOLDERS

1.6.1 RECESSION IMPACT

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Major secondary sources

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Breakdown of primaries

2.1.2.3 List of primary interview participants

2.1.3 SECONDARY AND PRIMARY RESEARCH

2.1.3.1 Key industry insights

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.2.2 TOP-DOWN APPROACH

FIGURE 4 APPROACH USED TO CAPTURE MARKET SIZE FROM SUPPLY SIDE

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.3 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 6 DATA TRIANGULATION

2.4 RESEARCH ASSUMPTIONS

- 2.4.1 PARAMETERS CONSIDERED TO ANALYZE IMPACT OF RECESSION
- 2.5 RESEARCH LIMITATIONS
- 2.6 RISK ASSESSMENT

3 EXECUTIVE SUMMARY

- FIGURE 7 HOT-TEMPERATURE SPIN ON CARBON SEGMENT TO HOLD LARGER MARKET SHARE IN 2023
- FIGURE 8 ADVANCED PACKAGING SEGMENT TO EXHIBIT HIGHEST CAGR FROM 2023 TO 2028
- FIGURE 9 FOUNDRIES TO HOLD LARGER MARKET SHARE IN 2028
- FIGURE 10 ASIA PACIFIC ACCOUNTED FOR LARGEST MARKET SHARE IN 2022

4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES FOR MARKET PLAYERS
 - FIGURE 11 INCREASING DEMAND FOR MEMORY DEVICES TO FUEL SPIN ON CARBON MARKET GROWTH
- 4.2 SPIN ON CARBON MARKET, BY END USER
 - FIGURE 12 IDMS & OSAT VENDORS TO WITNESS HIGHER CAGR DURING FORECAST PERIOD
- 4.3 SPIN ON CARBON MARKET IN AISA PACIFIC, BY END USER AND COUNTRY
 - FIGURE 13 FOUNDRIES AND TAIWAN HELD LARGEST SHARES OF ASIA PACIFIC SPIN ON CARBON MARKET IN 2022
- 4.4 SPIN ON CARBON MARKET, BY COUNTRY
 - FIGURE 14 FRANCE TO EXHIBIT HIGHEST CAGR IN GLOBAL SPIN ON CARBON MARKET DURING FORECAST PERIOD

5 MARKET OVERVIEW

- 5.1 INTRODUCTION
- 5.2 MARKET DYNAMICS
 - FIGURE 15 SPIN ON CARBON MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

- FIGURE 16 SPIN ON CARBON MARKET: IMPACT ANALYSIS OF DRIVERS

- 5.2.1.1 Advancements in semiconductor technology and increasing complexity of ICs
- 5.2.1.2 Increased use of advanced packaging technology in semiconductor industry
- 5.2.1.3 Implementation of extreme ultraviolet (EUV) lithography technology in

memory device production

5.2.2 RESTRAINTS

FIGURE 17 SPIN ON CARBON MARKET: IMPACT ANALYSIS OF RESTRAINTS

5.2.2.1 Availability of substitute competitive materials

5.2.3 OPPORTUNITIES

FIGURE 18 SPIN ON CARBON MARKET: IMPACT ANALYSIS OF OPPORTUNITIES

5.2.3.1 Constant focus on miniaturization of electronic devices

5.2.3.2 Integration of next-generation memory devices into AI, ML, and IoT
technology-based solutions

5.2.4 CHALLENGES

FIGURE 19 SPIN ON CARBON MARKET: IMPACT ANALYSIS OF CHALLENGES

5.2.4.1 Technical challenges associated with SOC materials

5.3 VALUE CHAIN ANALYSIS

FIGURE 20 SPIN ON CARBON MARKET: VALUE CHAIN ANALYSIS

5.4 ECOSYSTEM ANALYSIS

TABLE 1 KEY PARTICIPANTS AND THEIR ROLES IN ECOSYSTEM

5.5 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 21 TRENDS IMPACTING GROWTH OF PLAYERS IN SPIN ON CARBON
MARKET

5.6 TECHNOLOGY ANALYSIS

5.6.1 SPIN ON CARBON INTEGRATION INTO LITHOGRAPHY PROCESS

5.6.2 MINIATURIZATION OF ELECTRONIC DEVICES AND TREND OF IOT AND
EDGE COMPUTING

5.7 CASE STUDY ANALYSIS

5.7.1 BREWER SCIENCE INC. DEVELOPS HIGH-TEMPERATURE STABLE SPIN
ON CARBON MATERIALS FOR ADVANCED PATTERN TRANSFER APPLICATIONS

5.7.2 IRRESISTIBLE MATERIALS LTD. ACHIEVES HIGH ETCH RESISTANCE AND
HIGH THERMAL STABILITY WITH ADDITION OF THIN LAYER OF SOC

5.7.3 IRRESISTIBLE MATERIALS LTD. PROVIDES INTEL CORPORATION WITH
HIGH-RESOLUTION SOC HARDMASKS TO IMPROVE NANOFABRICATION
CAPABILITIES

5.8 PATENT ANALYSIS

FIGURE 22 TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENT
APPLICATIONS IN LAST 10 YEARS

TABLE 2 TOP 20 PATENT OWNERS IN LAST 10 YEARS

5.8.1 LIST OF MAJOR PATENTS

TABLE 3 SPIN ON CARBON MARKET: LIST OF MAJOR PATENTS

5.9 EXPORT/IMPORT SCENARIOS, BY HS CODE 381800

FIGURE 23 IMPORT DATA FOR HS CODE 381800-COMPLIANT PRODUCTS, BY

COUNTRY, 2018–2022 (USD THOUSAND)

FIGURE 24 EXPORT DATA FOR HS CODE 381800-COMPLIANT PRODUCTS, BY COUNTRY, 2018–2022 (USD THOUSAND)

5.10 KEY STAKEHOLDERS AND BUYING CRITERIA

5.10.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 25 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR END USERS

TABLE 4 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR END USERS (%)

5.10.2 BUYING CRITERIA

FIGURE 26 KEY BUYING CRITERIA FOR END USERS

TABLE 5 KEY BUYING CRITERIA FOR END USERS

5.11 PORTER'S FIVE FORCES ANALYSIS

FIGURE 27 SPIN ON CARBON MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 6 SPIN ON CARBON MARKET: PORTER'S FIVE FORCES ANALYSIS

5.11.1 INTENSITY OF COMPETITIVE RIVALRY

5.11.2 THREAT OF SUBSTITUTES

5.11.3 BARGAINING POWER OF BUYERS

5.11.4 BARGAINING POWER OF SUPPLIERS

5.11.5 THREAT OF NEW ENTRANTS

5.12 KEY CONFERENCES AND EVENTS, 2023–2025

TABLE 7 SPIN ON CARBON MARKET: LIST OF KEY CONFERENCES AND EVENTS

5.13 REGULATORY LANDSCAPE AND STANDARDS

5.13.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS RELATED TO SPIN ON CARBON TECHNOLOGY

TABLE 8 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 10 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 11 ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.13.2 STANDARDS RELATED TO SPIN ON CARBON TECHNOLOGY

TABLE 12 NORTH AMERICA: SAFETY STANDARDS FOR SPIN ON CARBON TECHNOLOGY

TABLE 13 EUROPE: SAFETY STANDARDS FOR SPIN ON CARBON MARKET

TABLE 14 ASIA PACIFIC: SAFETY STANDARDS FOR SPIN ON CARBON MARKET

TABLE 15 ROW: SAFETY STANDARDS FOR SPIN ON CARBON MARKET

6 SPIN ON CARBON MARKET, BY MATERIAL TYPE

6.1 INTRODUCTION

FIGURE 28 HOT-TEMPERATURE SPIN ON CARBON SEGMENT TO RECORD HIGHER CAGR DURING FORECAST PERIOD

TABLE 16 SPIN ON CARBON MARKET, BY MATERIAL TYPE, 2019–2022 (USD MILLION)

TABLE 17 SPIN ON CARBON MARKET, BY MATERIAL TYPE, 2023–2028 (USD MILLION)

6.2 HOT-TEMPERATURE SPIN ON CARBON (HT-SOC)

6.2.1 NEED FOR MATERIALS THAT CAN WITHSTAND ELEVATED THERMAL PROCESSING CONDITIONS TO DRIVE MARKET

6.3 NORMAL-TEMPERATURE SPIN ON CARBON (NT-SOC)

6.3.1 ABILITY TO PROVIDE EFFECTIVE PLANARIZATION PROPERTIES AT LOWER PROCESSING TEMPERATURES TO BOOST DEMAND

7 SPIN ON CARBON MARKET, BY APPLICATION

7.1 INTRODUCTION

FIGURE 29 SPIN ON CARBON MARKET, BY APPLICATION

FIGURE 30 MEMORY DEVICES TO CAPTURE LARGEST SHARE OF SPIN ON CARBON MARKET IN 2023

TABLE 18 SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 19 SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

7.2 LOGIC DEVICES

7.2.1 INCREASING TREND OF MINIATURIZATION AND SCALING IN SEMICONDUCTOR TECHNOLOGY TO DRIVE MARKET

TABLE 20 LOGIC DEVICES: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 21 LOGIC DEVICES: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 22 LOGIC DEVICES: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 23 LOGIC DEVICES: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

7.3 MEMORY DEVICES

7.3.1 GROWING FOCUS ON DEVELOPING HIGH-PERFORMANCE AND RELIABLE MEMORY AND STORAGE DEVICES TO BOOST DEMAND

TABLE 24 MEMORY DEVICES: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 25 MEMORY DEVICES: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 26 MEMORY DEVICES: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 27 MEMORY DEVICES: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

7.4 POWER DEVICES

7.4.1 RISING DEMAND FOR POWER ELECTRONICS WITH IMPROVED THERMAL CONDUCTIVITY TO FOSTER MARKET GROWTH

TABLE 28 POWER DEVICES: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 29 POWER DEVICES: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 30 POWER DEVICES: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 31 POWER DEVICES: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

7.5 MEMS (MICRO-ELECTRO-MECHANICAL SYSTEMS)

7.5.1 INCREASING DEMAND FOR MEMS FROM AUTOMOTIVE SYSTEM PROVIDERS TO CONTRIBUTE TO MARKET GROWTH

TABLE 32 MEMS: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 33 MEMS: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 34 MEMS: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 35 MEMS: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

7.6 PHOTONICS

7.6.1 RISING USE OF SOC TECHNOLOGY IN OPTICAL COMMUNICATION AND SENSING DEVICES TO STIMULATE MARKET GROWTH

TABLE 36 PHOTONICS: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 37 PHOTONICS: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 38 PHOTONICS: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 39 PHOTONICS: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

7.7 ADVANCED PACKAGING

7.7.1 GROWING DEMAND FOR SLIM SMARTPHONES WITH IMPROVED FEATURES TO ACCELERATE SOC DEMAND

TABLE 40 ADVANCED PACKAGING: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 41 ADVANCED PACKAGING: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 42 ADVANCED PACKAGING: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 43 ADVANCED PACKAGING: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

8 SPIN ON CARBON MARKET, BY END USER

8.1 INTRODUCTION

FIGURE 31 SPIN ON CARBON MARKET, BY END USER

FIGURE 32 FOUNDRIES TO ACCOUNT FOR MAJORITY OF MARKET SHARE IN 2023

TABLE 44 SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 45 SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

8.2 FOUNDRIES

8.2.1 GROWING ADOPTION OF INTERNET OF THINGS (IOT) TO BOOST DEMAND

TABLE 46 FOUNDRIES: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 47 FOUNDRIES: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 48 FOUNDRIES: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 49 FOUNDRIES: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

8.3 IDMS & OSAT VENDORS

8.3.1 INCREASING USE OF NEXT-GENERATION LITHOGRAPHY IN SEMICONDUCTOR MANUFACTURING TO DRIVE MARKET

TABLE 50 IDMS & OSAT VENDORS: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 51 IDMS & OSAT VENDORS: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

TABLE 52 IDMS & OSAT VENDORS: SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 53 IDMS & OSAT VENDORS: SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

9 SPIN ON CARBON MARKET, BY REGION

9.1 INTRODUCTION

FIGURE 33 SPIN ON CARBON MARKET, BY REGION

FIGURE 34 ASIA PACIFIC TO HOLD LARGEST MARKET SHARE THROUGHOUT FORECAST PERIOD

TABLE 54 SPIN ON CARBON MARKET, BY REGION, 2019–2022 (USD MILLION)

TABLE 55 SPIN ON CARBON MARKET, BY REGION, 2023–2028 (USD MILLION)

9.2 NORTH AMERICA

FIGURE 35 NORTH AMERICA: SPIN ON CARBON MARKET SNAPSHOT

TABLE 56 NORTH AMERICA: SPIN ON CARBON MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 57 NORTH AMERICA: SPIN ON CARBON MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 58 NORTH AMERICA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 59 NORTH AMERICA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 60 NORTH AMERICA: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 61 NORTH AMERICA: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

9.2.1 US

9.2.1.1 Significant presence of semiconductor giants to drive market

TABLE 62 US: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 63 US: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.2.2 CANADA

9.2.2.1 Increasing demand for high-performance semiconductor devices to fuel market growth

TABLE 64 CANADA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD

MILLION)

TABLE 65 CANADA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.2.3 MEXICO

9.2.3.1 Thriving semiconductor industry to accelerate spin on carbon technology demand

TABLE 66 MEXICO: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 67 MEXICO: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.2.4 IMPACT OF RECESSION ON SPIN ON CARBON MARKET IN NORTH AMERICA

9.3 EUROPE

FIGURE 36 EUROPE: SPIN ON CARBON MARKET SNAPSHOT

TABLE 68 EUROPE: SPIN ON CARBON MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 69 EUROPE: SPIN ON CARBON MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 70 EUROPE: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 71 EUROPE: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 72 EUROPE: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 73 EUROPE: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

9.3.1 UK

9.3.1.1 Government investments in developing advanced semiconductor products to drive market

TABLE 74 UK: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 75 UK: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.3.2 GERMANY

9.3.2.1 Implementation of IoT in manufacturing and automotive industries to fuel market growth

TABLE 76 GERMANY: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 77 GERMANY: SPIN ON CARBON MARKET, BY END USER, 2023–2028

(USD MILLION)

9.3.3 FRANCE

9.3.3.1 Highly developed transportation and communication networks to support market growth

TABLE 78 FRANCE: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 79 FRANCE: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.3.4 REST OF EUROPE

TABLE 80 REST OF EUROPE: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 81 REST OF EUROPE: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.3.5 IMPACT OF RECESSION ON SPIN ON CARBON MARKET IN EUROPE

9.4 ASIA PACIFIC

FIGURE 37 ASIA PACIFIC: SPIN ON CARBON MARKET SNAPSHOT

TABLE 82 ASIA PACIFIC: SPIN ON CARBON MARKET, BY COUNTRY, 2019–2022 (USD MILLION)

TABLE 83 ASIA PACIFIC: SPIN ON CARBON MARKET, BY COUNTRY, 2023–2028 (USD MILLION)

TABLE 84 ASIA PACIFIC: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 85 ASIA PACIFIC: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 86 ASIA PACIFIC: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 87 ASIA PACIFIC: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

9.4.1 CHINA

9.4.1.1 Made in China initiative to contribute to market growth

TABLE 88 CHINA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 89 CHINA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.4.2 JAPAN

9.4.2.1 Government focus on increasing semiconductor manufacturing capacity to provide growth opportunities

TABLE 90 JAPAN: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 91 JAPAN: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.4.3 SOUTH KOREA

9.4.3.1 Prominent presence of IDM firms to drive market

TABLE 92 SOUTH KOREA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 93 SOUTH KOREA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.4.4 TAIWAN

9.4.4.1 Growing investments by semiconductor companies in advanced manufacturing technologies to drive market

TABLE 94 TAIWAN: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 95 TAIWAN: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.4.5 REST OF ASIA PACIFIC

TABLE 96 REST OF ASIA PACIFIC: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 97 REST OF ASIA PACIFIC: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.4.6 IMPACT OF RECESSION ON SPIN ON CARBON MARKET IN ASIA PACIFIC
9.5 REST OF THE WORLD (ROW)

TABLE 98 ROW: SPIN ON CARBON MARKET, BY GEOGRAPHY, 2019–2022 (USD MILLION)

TABLE 99 ROW: SPIN ON CARBON MARKET, BY GEOGRAPHY, 2023–2028 (USD MILLION)

TABLE 100 ROW: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 101 ROW: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

TABLE 102 ROW: SPIN ON CARBON MARKET, BY APPLICATION, 2019–2022 (USD MILLION)

TABLE 103 ROW: SPIN ON CARBON MARKET, BY APPLICATION, 2023–2028 (USD MILLION)

9.5.1 SOUTH AMERICA

9.5.1.1 Growing number of fabrication facilities, research centers, and technological hubs to contribute to market growth

TABLE 104 SOUTH AMERICA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 105 SOUTH AMERICA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.5.2 GCC COUNTRIES

9.5.2.1 Strategic partnerships and collaborations between semiconductor companies to drive market

TABLE 106 GCC COUNTRIES: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 107 GCC COUNTRIES: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

9.5.3 REST OF MIDDLE EAST & AFRICA

TABLE 108 REST OF MIDDLE EAST & AFRICA: SPIN ON CARBON MARKET, BY END USER, 2019–2022 (USD MILLION)

TABLE 109 REST OF MIDDLE EAST & AFRICA: SPIN ON CARBON MARKET, BY END USER, 2023–2028 (USD MILLION)

10 COMPETITIVE LANDSCAPE

10.1 OVERVIEW

10.2 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 110 OVERVIEW OF STRATEGIES EMPLOYED BY KEY PLAYERS IN SPIN ON CARBON MARKET

10.2.1 PRODUCT PORTFOLIO

10.2.2 REGIONAL FOCUS

10.2.3 ORGANIC/INORGANIC GROWTH STRATEGIES

10.3 MARKET SHARE ANALYSIS, 2022

FIGURE 38 SPIN ON CARBON MARKET SHARE ANALYSIS, 2022

TABLE 111 SPIN ON CARBON MARKET: DEGREE OF COMPETITION

10.4 REVENUE ANALYSIS OF TOP PLAYERS IN SPIN ON CARBON MARKET

FIGURE 39 REVENUE ANALYSIS OF LEADING PLAYERS IN SPIN ON CARBON MARKET

10.5 EVALUATION MATRIX FOR KEY COMPANIES, 2022

10.5.1 STARS

10.5.2 PERVASIVE PLAYERS

10.5.3 EMERGING LEADERS

10.5.4 PARTICIPANTS

FIGURE 40 SPIN ON CARBON MARKET (GLOBAL): COMPANY EVALUATION MATRIX, 2022

10.6 KEY COMPANY FOOTPRINT

TABLE 112 OVERALL FOOTPRINT (10 COMPANIES)

TABLE 113 END USER FOOTPRINT (10 COMPANIES)

TABLE 114 APPLICATION FOOTPRINT (10 COMPANIES)

TABLE 115 REGION FOOTPRINT (10 COMPANIES)

10.7 EVALUATION MATRIX FOR START-UPS/SMES, 2022

10.7.1 PROGRESSIVE COMPANIES

10.7.2 RESPONSIVE COMPANIES

10.7.3 DYNAMIC COMPANIES

10.7.4 STARTING BLOCKS

FIGURE 41 SPIN ON CARBON MARKET (GLOBAL): START-UPS/SMES MATRIX, 2022

TABLE 116 SPIN ON CARBON MARKET: LIST OF KEY START-UPS/SMES

TABLE 117 SPIN ON CARBON MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES

10.8 COMPETITIVE SITUATIONS AND TRENDS

10.8.1 PRODUCT LAUNCHES AND DEVELOPMENTS

TABLE 118 SPIN ON CARBON MARKET: PRODUCT LAUNCHES AND DEVELOPMENTS, JANUARY 2019– AUGUST 2023

10.8.2 DEALS

TABLE 119 SPIN ON CARBON MARKET: DEALS, JANUARY 2019– SEPTEMBER 2023

10.8.3 OTHERS

TABLE 120 SPIN ON CARBON MARKET: OTHERS, JANUARY 2019– FEBRUARY 2023

11 COMPANY PROFILES

11.1 KEY PLAYERS

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)*

11.1.1 SAMSUNG SDI CO., LTD.

TABLE 121 SAMSUNG SDI CO., LTD.: COMPANY OVERVIEW

FIGURE 42 SAMSUNG SDI CO., LTD.: COMPANY SNAPSHOT

TABLE 122 SAMSUNG SDI CO., LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 123 SAMSUNG SDI CO., LTD.: DEALS

11.1.2 SHIN-ETSU CHEMICAL CO., LTD.

TABLE 124 SHIN-ETSU CHEMICAL CO., LTD.: COMPANY OVERVIEW

FIGURE 43 SHIN-ETSU CHEMICAL CO., LTD.: COMPANY SNAPSHOT

TABLE 125 SHIN-ETSU CHEMICAL CO., LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 126 SHIN-ETSU CHEMICAL CO., LTD.: OTHERS

11.1.3 DONGJIN SEMICHEM CO LTD.

TABLE 127 DONGJIN SEMICHEM CO LTD.: COMPANY OVERVIEW

TABLE 128 DONGJIN SEMICHEM CO LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

11.1.4 MERCK KGAA

TABLE 129 MERCK KGAA: COMPANY OVERVIEW

FIGURE 44 MERCK KGAA: COMPANY SNAPSHOT

TABLE 130 MERCK KGAA: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 131 MERCK KGAA: DEALS

TABLE 132 MERCK KGAA: OTHERS

11.1.5 YCCHEM CO., LTD.

TABLE 133 YCCHEM CO., LTD.: COMPANY OVERVIEW

TABLE 134 YCCHEM CO., LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

11.1.6 BREWER SCIENCE, INC.

TABLE 135 BREWER SCIENCE, INC.: COMPANY OVERVIEW

TABLE 136 BREWER SCIENCE, INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 137 BREWER SCIENCE, INC.: PRODUCT LAUNCHES

11.1.7 JSR MICRO, INC.

TABLE 138 JSR MICRO, INC.: COMPANY OVERVIEW

TABLE 139 JSR MICRO, INC.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 140 JSR MICRO, INC.: OTHERS

11.1.8 IRRESISTIBLE MATERIALS LTD

TABLE 141 IRRESISTIBLE MATERIALS LTD: COMPANY OVERVIEW

TABLE 142 IRRESISTIBLE MATERIALS LTD: PRODUCTS/SERVICES/SOLUTIONS OFFERED

11.1.9 KOYJ CO., LTD.

TABLE 143 KOYJ CO., LTD.: COMPANY OVERVIEW

TABLE 144 KOYJ CO., LTD.: PRODUCTS/SERVICES/SOLUTIONS OFFERED

11.1.10 NANO-C

TABLE 145 NANO-C: COMPANY OVERVIEW

TABLE 146 NANO-C: PRODUCTS/SERVICES/SOLUTIONS OFFERED

TABLE 147 NANO-C: DEALS

*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

11.2 OTHER PLAYERS

11.2.1 DUPONT

11.2.2 DNF CO., LTD.

11.2.3 PIBOND OY

11.2.4 APPLIED MATERIALS, INC.

11.2.5 KAYAKU ADVANCED MATERIALS, INC.

12 APPENDIX

12.1 DISCUSSION GUIDE

12.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

12.3 CUSTOMIZATION OPTIONS

12.4 RELATED REPORTS

12.5 AUTHOR DETAILS

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