

# Global BARC and TARC Competitive Landscape Professional Research Report 2025

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## Abstracts

### Market Overview

According to DIResearch's in-depth investigation and research, the global BARC and TARC market size will reach 343.80 Million USD in 2025 and is projected to reach 558.60 Million USD by 2032, with a CAGR of 7.18% (2025-2032). Notably, the China BARC and TARC market has changed rapidly in the past few years. By 2025, China's market size is expected to be Million USD, representing approximately % of the global market share.

### Research Summary

Top anti-reflective coatings (TARCs) & Bottom anti-reflective coatings (BARCs) is a spray coating technology used to reduce the reflectivity of light. The bottom anti-reflective coating is a layer that is sprayed under the surface of the object, while the top anti-reflective coating is a layer that is applied on the surface of the object. Both of these coatings are effective in reducing small amounts of light reflection, making images clearer and brighter. Widely used in optical equipment, such as camera lenses, telescopes, microscopes, etc.

The major global manufacturers of BARC and TARC include Merck Group, DuPont, Brewer Science, Nissan Chemical, Dongjin Semichem, Honeywell, Tokyo Ohka Kogyo, etc. The global players competition landscape in this report is divided into three tiers. The first tier comprises global leading enterprises that command a substantial market share, hold a dominant industry position, possess strong competitiveness and influence, and generate significant revenue. The second tier includes companies with a notable market presence and reputation; these firms actively follow industry leaders in product,

service, or technological innovation and maintain a moderate revenue scale. The third tier consists of smaller companies with limited market share and lower brand recognition, primarily focused on local markets and generating comparatively lower revenue.

This report studies the market size, price trends and future development prospects of BARC and TARC. Focus on analysing the market share, product portfolio, prices, sales, revenue and gross profit margin of global major manufacturers, as well as the market status and trends of different product types and applications in the global BARC and TARC market. The report data covers historical data from 2020 to 2024, based year in 2025 and forecast data from 2026 to 2032.

The regions and countries in the report include North America, Europe, China, APAC (excl. China), Latin America and Middle East and Africa, covering the BARC and TARC market conditions and future development trends of key regions and countries, combined with industry-related policies and the latest technological developments, analyze the development characteristics of BARC and TARC industries in various regions and countries, help companies understand the development characteristics of each region, help companies formulate business strategies, and achieve the ultimate goal of the company's global development strategy.

The data sources of this report mainly include the National Bureau of Statistics, customs databases, industry associations, corporate financial reports, third-party databases, etc. Among them, macroeconomic data mainly comes from the National Bureau of Statistics, International Economic Research Organization; industry statistical data mainly come from industry associations; company data mainly comes from interviews, public information collection, third-party reliable databases, and price data mainly comes from various markets monitoring database.

Global Key Manufacturers of BARC and TARC Include:

Merck Group

DuPont

Brewer Science

Nissan Chemical

Dongjin Semichem

Honeywell

Tokyo Ohka Kogyo

BARC and TARC Product Segment Include:

Bottom Anti-reflective Coatings

Top Anti-reflective Coatings

BARC and TARC Product Application Include:

KrF Photoresist

ArF Photoresist

Others

## **Chapter Scope**

Chapter 1: Product Research Range, Product Types and Applications, Market Overview, Market Situation and Trends

Chapter 2: Global BARC and TARC Industry PESTEL Analysis

Chapter 3: Global BARC and TARC Industry Porter's Five Forces Analysis

Chapter 4: Global BARC and TARC Major Regional Market Size (Revenue, Sales, Price) and Forecast Analysis

Chapter 5: Global BARC and TARC Market Size and Forecast by Type and Application Analysis

Chapter 6: North America BARC and TARC Competitive Analysis (Market Size, Key

Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 7: Europe BARC and TARC Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 8: China BARC and TARC Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 9: APAC (Excl. China) BARC and TARC Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 10: Latin America BARC and TARC Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 11: Middle East and Africa BARC and TARC Competitive Analysis (Market Size, Key Players and Market Share, Product Type and Application Segment Analysis, Countries Analysis)

Chapter 12: Global BARC and TARC Competitive Analysis of Key Manufacturers (Sales, Revenue, Market Share, Price, Regional Distribution and Industry Concentration)

Chapter 13: Key Company Profiles (Product Portfolio, Sales, Revenue, Price and Gross Margin)

Chapter 14: Industrial Chain Analysis, Include Raw Material Suppliers, Distributors and Customers

Chapter 15: Research Findings and Conclusion

Chapter 16: Methodology and Data Sources

## Contents

### **1 BARC AND TARC MARKET OVERVIEW**

- 1.1 Product Definition and Statistical Scope
- 1.2 BARC and TARC Product by Type
  - 1.2.1 Bottom Anti-reflective Coatings
  - 1.2.2 Top Anti-reflective Coatings
- 1.3 BARC and TARC Product by Application
  - 1.3.1 KrF Photoresist
  - 1.3.2 ArF Photoresist
  - 1.3.3 Others
- 1.4 Global BARC and TARC Market Revenue and Sales Analysis
  - 1.4.1 Global BARC and TARC Revenue Market Size Analysis (2020-2032)
  - 1.4.2 Global BARC and TARC Sales Market Size Analysis (2020-2032)
  - 1.4.3 Global BARC and TARC Market Sales Price Trend Analysis (2020-2032)
- 1.5 BARC and TARC Industry Trends and Innovation
  - 1.5.1 BARC and TARC Industry Trends and Innovation
  - 1.5.2 BARC and TARC Market Drivers and Challenges

### **2 BARC AND TARC MARKET PESTEL ANALYSIS**

- 2.1 Political Factors Analysis
- 2.2 Economic Factors Analysis
- 2.3 Social Factors Analysis
- 2.4 Technological Factors Analysis
- 2.5 Environmental Factors Analysis
- 2.6 Legal Factors Analysis

### **3 BARC AND TARC MARKET PORTER'S FIVE FORCES ANALYSIS**

- 3.1 Competitive Rivalry
- 3.2 Threat of New Entrants
- 3.3 Bargaining Power of Suppliers
- 3.4 Bargaining Power of Buyers
- 3.5 Threat of Substitutes

### **4 GLOBAL BARC AND TARC MARKET ANALYSIS BY REGIONS**

- 4.1 Global BARC and TARC Overall Market: 2024 VS 2025 VS 2032
- 4.2 Global BARC and TARC Revenue and Forecast Analysis (2020-2032)
  - 4.2.1 Global BARC and TARC Revenue and Market Share by Region (2020-2025)
  - 4.2.2 Global BARC and TARC Revenue and Market Share Forecast by Region (2026-2032)
- 4.3 Global BARC and TARC Sales and Forecast Analysis (2020-2032)
  - 4.3.1 Global BARC and TARC Sales and Market Share by Region (2020-2025)
  - 4.3.2 Global BARC and TARC Sales and Market Share Forecast by Region (2026-2032)
- 4.4 Global BARC and TARC Sales Price Trend Analysis (2020-2032)

## **5 GLOBAL BARC AND TARC MARKET SIZE BY TYPE AND APPLICATION**

- 5.1 Global BARC and TARC Market Size by Type
  - 5.1.1 Global BARC and TARC Revenue and Forecast Analysis by Type (2020-2032)
  - 5.1.2 Global BARC and TARC Sales and Forecast Analysis by Type (2020-2032)
- 5.2 Global BARC and TARC Market Size by Application
  - 5.2.1 Global BARC and TARC Revenue and Forecast Analysis by Application (2020-2032)
  - 5.2.2 Global BARC and TARC Sales and Forecast Analysis by Application (2020-2032)

## **6 NORTH AMERICA**

- 6.1 North America BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 6.2 North America Key Manufacturers Analysis
- 6.3 North America BARC and TARC Market Size by Type
  - 6.3.1 North America BARC and TARC Sales by Type (2020-2032)
  - 6.3.2 North America BARC and TARC Revenue by Type (2020-2032)
- 6.4 North America BARC and TARC Market Size by Application
  - 6.4.1 North America BARC and TARC Sales by Application (2020-2032)
  - 6.4.2 North America BARC and TARC Revenue by Application (2020-2032)
- 6.5 North America BARC and TARC Market Size by Country
  - 6.5.1 US
  - 6.5.2 Canada

## **7 EUROPE**

- 7.1 Europe BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 7.2 Europe Key Manufacturers Analysis
- 7.3 Europe BARC and TARC Market Size by Type
  - 7.3.1 Europe BARC and TARC Sales by Type (2020-2032)
  - 7.3.2 Europe BARC and TARC Revenue by Type (2020-2032)
- 7.4 Europe BARC and TARC Market Size by Application
  - 7.4.1 Europe BARC and TARC Sales by Application (2020-2032)
  - 7.4.2 Europe BARC and TARC Revenue by Application (2020-2032)
- 7.5 Europe BARC and TARC Market Size by Country
  - 7.5.1 Germany
  - 7.5.2 France
  - 7.5.3 United Kingdom
  - 7.5.4 Italy
  - 7.5.5 Spain
  - 7.5.6 Benelux

## **8 CHINA**

- 8.1 China BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 8.2 China Key Manufacturers Analysis
- 8.3 China BARC and TARC Market Size by Type
  - 8.3.1 China BARC and TARC Sales by Type (2020-2032)
  - 8.3.2 China BARC and TARC Revenue by Type (2020-2032)
- 8.4 China BARC and TARC Market Size by Application
  - 8.4.1 China BARC and TARC Sales by Application (2020-2032)
  - 8.4.2 China BARC and TARC Revenue by Application (2020-2032)

## **9 APAC (EXCL. CHINA)**

- 9.1 APAC (excl. China) BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 9.2 APAC (excl. China) Key Manufacturers Analysis
- 9.3 APAC (excl. China) BARC and TARC Market Size by Type
  - 9.3.1 APAC (excl. China) BARC and TARC Sales by Type (2020-2032)
  - 9.3.2 APAC (excl. China) BARC and TARC Revenue by Type (2020-2032)
- 9.4 APAC (excl. China) BARC and TARC Market Size by Application
  - 9.4.1 APAC (excl. China) BARC and TARC Sales by Application (2020-2032)
  - 9.4.2 APAC (excl. China) BARC and TARC Revenue by Application (2020-2032)
- 9.5 APAC (excl. China) BARC and TARC Market Size by Country

- 9.5.1 Japan
- 9.5.2 South Korea
- 9.5.3 India
- 9.5.4 Australia
- 9.5.5 Southeast Asia

## **10 LATIN AMERICA**

- 10.1 Latin America BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 10.2 Latin America Key Manufacturers Analysis
- 10.3 Latin America BARC and TARC Market Size by Type
  - 10.3.1 Latin America BARC and TARC Sales by Type (2020-2032)
  - 10.3.2 Latin America BARC and TARC Revenue by Type (2020-2032)
- 10.4 Latin America BARC and TARC Market Size by Application
  - 10.4.1 Latin America BARC and TARC Sales by Application (2020-2032)
  - 10.4.2 Latin America BARC and TARC Revenue by Application (2020-2032)
- 10.5 Latin America BARC and TARC Market Size by Country
- 10.6 Latin America BARC and TARC Market Size by Country
  - 10.6.1 Mexico
  - 10.6.2 Brazil

## **11 MIDDLE EAST & AFRICA**

- 11.1 Middle East & Africa BARC and TARC Market Size and Growth Rate Analysis (2020-2032)
- 11.2 Middle East & Africa Key Manufacturers Analysis
- 11.3 Middle East & Africa BARC and TARC Market Size by Type
  - 11.3.1 Middle East & Africa BARC and TARC Sales by Type (2020-2032)
  - 11.3.2 Middle East & Africa BARC and TARC Revenue by Type (2020-2032)
- 11.4 Middle East & Africa BARC and TARC Market Size by Application
  - 11.4.1 Middle East & Africa BARC and TARC Sales by Application (2020-2032)
  - 11.4.2 Middle East & Africa BARC and TARC Revenue by Application (2020-2032)
- 11.5 Middle East BARC and TARC Market Size by Country
  - 11.5.1 Saudi Arabia
  - 11.5.2 South Africa

## **12 COMPETITION BY MANUFACTURERS**

## 12.1 Global BARC and TARC Market Sales, Revenue and Price by Key Manufacturers (2021-2025)

- 12.1.1 Global BARC and TARC Market Sales by Key Manufacturers (2021-2025)
- 12.1.2 Global BARC and TARC Market Revenue by Key Manufacturers (2021-2025)
- 12.1.3 Global BARC and TARC Average Sales Price by Manufacturers (2021-2025)

## 12.2 BARC and TARC Competitive Landscape Analysis and Market Dynamic

- 12.2.1 BARC and TARC Competitive Landscape Analysis
- 12.2.2 Global Key Manufacturers Headquarter Location and Key Area Sales
- 12.2.3 Market Dynamic

# 13 KEY COMPANIES ANALYSIS

## 13.1 Merck Group

13.1.1 Merck Group Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.1.2 Merck Group BARC and TARC Product Portfolio

13.1.3 Merck Group BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

## 13.2 DuPont

13.2.1 DuPont Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.2.2 DuPont BARC and TARC Product Portfolio

13.2.3 DuPont BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

## 13.3 Brewer Science

13.3.1 Brewer Science Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.3.2 Brewer Science BARC and TARC Product Portfolio

13.3.3 Brewer Science BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

## 13.4 Nissan Chemical

13.4.1 Nissan Chemical Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

13.4.2 Nissan Chemical BARC and TARC Product Portfolio

13.4.3 Nissan Chemical BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

## 13.5 Dongjin Semichem

13.5.1 Dongjin Semichem Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

- 13.5.2 Dongjin Semichem BARC and TARC Product Portfolio
- 13.5.3 Dongjin Semichem BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)
- 13.6 Honeywell
  - 13.6.1 Honeywell Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
  - 13.6.2 Honeywell BARC and TARC Product Portfolio
  - 13.6.3 Honeywell BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)
- 13.7 Tokyo Ohka Kogyo
  - 13.7.1 Tokyo Ohka Kogyo Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)
  - 13.7.2 Tokyo Ohka Kogyo BARC and TARC Product Portfolio
  - 13.7.3 Tokyo Ohka Kogyo BARC and TARC Market Data Analysis (Revenue, Sales, Price, Gross Margin and Market Share) (2021-2025)

## **14 INDUSTRY CHAIN ANALYSIS**

- 14.1 BARC and TARC Industry Chain Analysis
- 14.2 BARC and TARC Industry Raw Material and Suppliers Analysis
  - 14.2.1 BARC and TARC Key Raw Material Supply Analysis
  - 14.2.2 Raw Material Suppliers and Contact Information
- 14.3 BARC and TARC Typical Downstream Customers
- 14.4 BARC and TARC Sales Channel Analysis

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 METHODOLOGY AND DATA SOURCE**

- 16.1 Methodology/Research Approach
- 16.2 Research Scope
- 16.3 Benchmarks and Assumptions
- 16.4 Data Source
  - 16.4.1 Primary Sources
  - 16.4.2 Secondary Sources
- 16.5 Data Cross Validation
- 16.6 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1: Global BARC and TARC Market Size Growth Rate by Type, 2024 VS 2025 VS 2032 (US\$ Million)

Table 2: Global BARC and TARC Market Size Growth Rate by Application, 2024 VS 2025 VS 2032 (US\$ Million)

Table 3: BARC and TARC Industry Development Status

Table 4: BARC and TARC Industry Development Trends

Table 5: Global BARC and TARC Market Size by Region in US\$ Million: 2024 VS 2025 VS 2032

Table 6: Global BARC and TARC Revenue by Region (2020-2025) & (US\$ Million)

Table 7: Global BARC and TARC Revenue Market Share by Region (2020-2025)

Table 8: Global BARC and TARC Revenue Forecast by Region (2026-2032) & (US\$ Million)

Table 9: Global BARC and TARC Revenue Market Share Forecast by Region (2026-2032)

Table 10: Global BARC and TARC Sales by Region (2020-2025) & (Kg)

Table 11: Global BARC and TARC Sales Market Share by Region (2020-2025)

Table 12: Global BARC and TARC Sales Forecast by Region (2026-2032) & (Kg)

Table 13: Global BARC and TARC Sales Market Share Forecast by Region (2026-2032)

Table 14: Global BARC and TARC Revenue Analysis by Type (2020-2025) & (US\$ Million)

Table 15: Global BARC and TARC Revenue Analysis Forecast by Type (2026-2032) & (US\$ Million)

Table 16: Global BARC and TARC Sales Analysis by Type (2020-2025) & (Kg)

Table 17: Global BARC and TARC Sales Analysis Forecast by Type (2026-2032) & (Kg)

Table 18: Global BARC and TARC Revenue Analysis by Application (2020-2025) & (US\$ Million)

Table 19: Global BARC and TARC Revenue Analysis Forecast by Application (2026-2032) & (US\$ Million)

Table 20: Global BARC and TARC Sales Analysis by Application (2020-2025) & (Kg)

Table 21: Global BARC and TARC Sales Analysis Forecast by Application (2026-2032) & (Kg)

Table 22: Key BARC and TARC Players in North America

Table 23: North America BARC and TARC Sales by Type (2020-2025) & (Kg)

Table 24: North America BARC and TARC Sales by Type (2026-2032) & (Kg)

Table 25: North America BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)

Table 26: North America BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)

Table 27: North America BARC and TARC Sales by Application (2020-2025) & (Kg)

Table 28: North America BARC and TARC Sales by Application (2026-2032) & (Kg)

Table 29: North America BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)

Table 30: North America BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)

Table 31: North America BARC and TARC Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 32: North America BARC and TARC Revenue Market Size by Country (2026-2032) & (US\$ Million)

Table 33: North America BARC and TARC Sales Market Size by Country (2020-2025) & (Kg)

Table 34: North America BARC and TARC Sales Market Size by Country (2026-2032) & (Kg)

Table 35: Key BARC and TARC Players in Europe

Table 36: Europe BARC and TARC Sales by Type (2020-2025) & (Kg)

Table 37: Europe BARC and TARC Sales by Type (2026-2032) & (Kg)

Table 38: Europe BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)

Table 39: Europe BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)

Table 40: Europe BARC and TARC Sales by Application (2020-2025) & (Kg)

Table 41: Europe BARC and TARC Sales by Application (2026-2032) & (Kg)

Table 42: Europe BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)

Table 43: Europe BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)

Table 44: Europe BARC and TARC Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 45: Europe BARC and TARC Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 46: Europe BARC and TARC Sales Market Size by Country (2020-2025) & (Kg)

Table 47: Europe BARC and TARC Sales Market Size Forecast by Country (2026-2032) & (Kg)

Table 48: Key BARC and TARC Players in China

Table 49: China BARC and TARC Sales by Type (2020-2025) & (Kg)

Table 50: China BARC and TARC Sales by Type (2026-2032) & (Kg)

- Table 51: China BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)
- Table 52: China BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)
- Table 53: China BARC and TARC Sales by Application (2020-2025) & (Kg)
- Table 54: China BARC and TARC Sales by Application (2026-2032) & (Kg)
- Table 55: China BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)
- Table 56: China BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)
- Table 57: Key BARC and TARC Players in APAC (excl. China)
- Table 58: APAC (excl. China) BARC and TARC Sales by Type (2020-2025) & (Kg)
- Table 59: APAC (excl. China) BARC and TARC Sales by Type (2026-2032) & (Kg)
- Table 60: APAC (excl. China) BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)
- Table 61: APAC (excl. China) BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)
- Table 62: APAC (excl. China) BARC and TARC Sales by Application (2020-2025) & (Kg)
- Table 63: APAC (excl. China) BARC and TARC Sales by Application (2026-2032) & (Kg)
- Table 64: APAC (excl. China) BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)
- Table 65: APAC (excl. China) BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)
- Table 66:: APAC (excl. China) BARC and TARC Revenue Market Size by Country (2020-2025) & (US\$ Million)
- Table 67: APAC (excl. China) BARC and TARC Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)
- Table 68: APAC (excl. China) BARC and TARC Sales Market Size by Country (2020-2025) & (Kg)
- Table 69: APAC (excl. China) BARC and TARC Sales Market Size Forecast by Country (2026-2032) & (Kg)
- Table 70: Key BARC and TARC Players in Latin America
- Table 71: Latin America BARC and TARC Sales by Type (2020-2025) & (Kg)
- Table 72: Latin America BARC and TARC Sales by Type (2026-2032) & (Kg)
- Table 73: Latin America BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)
- Table 74: Latin America BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)
- Table 75: Latin America BARC and TARC Sales by Application (2020-2025) & (Kg)
- Table 76: Latin America BARC and TARC Sales by Application (2026-2032) & (Kg)
- Table 77: Latin America BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)

Million)

Table 78: Latin America BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)

Table 79: Latin America BARC and TARC Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 80: Latin America BARC and TARC Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 81: Latin America BARC and TARC Sales Market Size by Country (2020-2025) & (Kg)

Table 82: Latin America BARC and TARC Sales Market Size Forecast by Country (2026-2032) & (Kg)

Table 83: Key BARC and TARC Players in Middle East & Africa

Table 84: Middle East & Africa BARC and TARC Sales by Type (2020-2025) & (Kg)

Table 85: Middle East & Africa BARC and TARC Sales by Type (2026-2032) & (Kg)

Table 86: Middle East & Africa BARC and TARC Revenue by Type (2020-2025) & (US\$ Million)

Table 87: Middle East & Africa BARC and TARC Revenue by Type (2026-2032) & (US\$ Million)

Table 88: Middle East & Africa BARC and TARC Sales by Application (2020-2025) & (Kg)

Table 89: Middle East & Africa BARC and TARC Sales by Application (2026-2032) & (Kg)

Table 90: Middle East & Africa BARC and TARC Revenue by Application (2020-2025) & (US\$ Million)

Table 91: Middle East & Africa BARC and TARC Revenue by Application (2026-2032) & (US\$ Million)

Table 92: Middle East & Africa BARC and TARC Revenue Market Size by Country (2020-2025) & (US\$ Million)

Table 93: Middle East & Africa BARC and TARC Revenue Market Size Forecast by Country (2026-2032) & (US\$ Million)

Table 94: Middle East & Africa BARC and TARC Sales Market Size by Country (2020-2025) & (Kg)

Table 95: Middle East & Africa BARC and TARC Sales Market Size Forecast by Country (2026-2032) & (Kg)

Table 96: Global BARC and TARC Market Sales by Key Manufacturers (2021-2025) & (Kg)

Table 97: Global BARC and TARC Sales Market Share by Key Manufacturers (2021-2025)

Table 98: Global BARC and TARC Market Revenue by Key Manufacturers (2021-2025)

& (US\$ Million)

Table 99: Global BARC and TARC Revenue Market Share by Key Manufacturers (2021-2025)

Table 100: Global Average Sales Price by Manufacturers (2021-2025) & (USD/Kg)

Table 101: Global Key Manufacturers Headquarter Location and Key Area Sales

Table 102: Market Mergers & Acquisitions, Expansion

Table 103: Merck Group Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 104: Merck Group BARC and TARC Product Portfolio

Table 105: Merck Group BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 106: DuPont Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 107: DuPont BARC and TARC Product Portfolio

Table 108: DuPont BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 109: Brewer Science Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 110: Brewer Science BARC and TARC Product Portfolio

Table 111: Brewer Science BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 112: Nissan Chemical Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 113: Nissan Chemical BARC and TARC Product Portfolio

Table 114: Nissan Chemical BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 115: Dongjin Semichem Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 116: Dongjin Semichem BARC and TARC Product Portfolio

Table 117: Dongjin Semichem BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 118: Honeywell Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 119: Honeywell BARC and TARC Product Portfolio

Table 120: Honeywell BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 121: Tokyo Ohka Kogyo Basic Company Profile (Employees, Areas Service, Competitors and Contact Information)

Table 122: Tokyo Ohka Kogyo BARC and TARC Product Portfolio

Table 123: Tokyo Ohka Kogyo BARC and TARC Revenue (US\$ Million), Sales (Kg), Price (USD/Kg), Gross Margin and Market Share (2021-2025)

Table 124: Upstream Key Raw Material Price List

Table 125: BARC and TARC Raw Material Suppliers and Contact Information

Table 126: BARC and TARC Typical Customer List

Table 127: BARC and TARC Distributors List

## List Of Figures

### LIST OF FIGURES

Figure 1: BARC and TARC Product Pictures

Figure 2: Bottom Anti-reflective Coatings Picture Scope

Figure 3: Top Anti-reflective Coatings Picture Scope

Figure 4: KrF Photoresist Picture Scope

Figure 5: ArF Photoresist Picture Scope

Figure 6: Others Picture Scope

Figure 7: Global BARC and TARC Market Size Analysis: 2024 VS 2025 VS 2032 (US\$ Million)

Figure 8: Global BARC and TARC Market Revenue and Growth Rate Analysis: (2020-2032) & (US\$ Million)

Figure 9: Global BARC and TARC Market Sales and Growth Rate Analysis (2020-2032) & (Kg)

Figure 10: Global BARC and TARC Market Price Trend Analysis (2020-2032) & (USD/Kg)

Figure 11: Global BARC and TARC Market Size by Region (2020-2032) & (US\$ Million)

Figure 12: Global BARC and TARC Market Share Scenario by Region in Percentage: 2025 Versus 2032

Figure 13: Global BARC and TARC Sales Price by Region (2020-2032) & (Kg)

Figure 14: North America BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 15: North America BARC and TARC Revenue Market Share by Players in 2024

Figure 16: North America BARC and TARC Sales Market Share by Type (2020-2032)

Figure 17: North America BARC and TARC Revenue Market Share by Type (2020-2032)

Figure 18: North America BARC and TARC Sales Market Share by Application (2020-2032)

Figure 19: North America BARC and TARC Revenue Market Share by Application (2020-2032)

Figure 20: US BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 21: Canada BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 22: Europe BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 23: Europe BARC and TARC Revenue Market Share by Players in 2024

Figure 24: Europe BARC and TARC Sales Market Share by Type (2020-2032)

Figure 25: Europe BARC and TARC Revenue Market Share by Type (2020-2032)

- Figure 26:Europe BARC and TARC Sales Market Share by Application (2020-2032)
- Figure 27:Europe BARC and TARC Revenue Market Share by Application (2020-2032)
- Figure 28:Germany BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 29:France BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 30:United Kingdom BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 31:Italy BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 32:Spain BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 33:Benelux BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 34:China BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)
- Figure 35:China BARC and TARC Revenue Market Share by Players in 2024
- Figure 36:China BARC and TARC Sales Market Share by Type (2020-2032)
- Figure 37:China BARC and TARC Revenue Market Share by Type (2020-2032)
- Figure 38:China BARC and TARC Sales Market Share by Application (2020-2032)
- Figure 39:China BARC and TARC Revenue Market Share by Application (2020-2032)
- Figure 40:APAC (excl. China) BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)
- Figure 41:APAC (excl. China) BARC and TARC Revenue Market Share by Players in 2024
- Figure 42:APAC (excl. China) BARC and TARC Sales Market Share by Type (2020-2032)
- Figure 43:APAC (excl. China) BARC and TARC Revenue Market Share by Type (2020-2032)
- Figure 44:APAC (excl. China) BARC and TARC Sales Market Share by Application (2020-2032)
- Figure 45:APAC (excl. China) BARC and TARC Revenue Market Share by Application (2020-2032)
- Figure 46:Japan BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 47:South Korea BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 48:India BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 49:Australia BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 50:Southeast Asia BARC and TARC Revenue (2020-2032) & (US\$ Million)
- Figure 51:Latin America BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)
- Figure 52:Latin America BARC and TARC Revenue Market Share by Players in 2024
- Figure 53:Latin America BARC and TARC Sales Market Share by Type (2020-2032)
- Figure 54:Latin America BARC and TARC Revenue Market Share by Type (2020-2032)
- Figure 55:Latin America BARC and TARC Sales Market Share by Application (2020-2032)

Figure 56:Latin America BARC and TARC Revenue Market Share by Application (2020-2032)

Figure 57:Mexico BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 58:Brazil BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 59:Middle East & Africa BARC and TARC Market Size and Growth Rate (2020-2032) & (US\$ Million)

Figure 60:Middle East & Africa BARC and TARC Revenue Market Share by Players in 2024

Figure 61:Middle East & Africa BARC and TARC Sales Market Share by Type (2020-2032)

Figure 62:Middle East & Africa BARC and TARC Revenue Market Share by Type (2020-2032)

Figure 63:Middle East & Africa BARC and TARC Sales Market Share by Application (2020-2032)

Figure 64:Middle East & Africa BARC and TARC Revenue Market Share by Application (2020-2032)

Figure 65:Saudi Arabia BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 66:South Africa BARC and TARC Revenue (2020-2032) & (US\$ Million)

Figure 67:Global BARC and TARC Sales Market Share by Key Manufacturers in 2024

Figure 68:Global BARC and TARC Revenue Market Share by Key Manufacturers in 2024

Figure 69:Global BARC and TARC Industry Competition Landscape

Figure 70:BARC and TARC Industry Chain Analysis

Figure 71:Bottom-Up and Top-Down Research Methods

Figure 72:Key Interview Objectives

Figure 73:Data Cross Validation

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