

# Global Bottom Anti-Reflection Coatings (BARC) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Bottom Anti-Reflection Coatings (BARC) market size was valued at US\$ 298 million in 2025 and is forecast to a readjusted size of US\$ 471 million by 2032 with a CAGR of 7.5% during review period.

BARC (Bottom Anti-Reflective Coatings) is a lithography material applied between the substrate/film stack and the photoresist, engineered to control reflectivity via optical constants ( $n$ ,  $k$ ), thickness, and absorption, thereby suppressing standing waves and swing-curve effects caused by substrate reflections and improving CD control and pattern fidelity. In industry practice, BARC is most commonly supplied as spin-on organic BARC, while inorganic / silicon-containing BARCs exist for more complex stack integration and etch/hardmask synergies. BARC is typically positioned as part of the broader lithography “reflective multilayer / ancillary materials” portfolio alongside TARCs and other support chemistries.

From a process/technology and application perspective, BARC provides more than reflectivity control: it supports vertical profile, expands process latitude, and helps mitigate topography-related lithography issues, with some products positioned for gap fill and planarization. The mainstream wavelength coverage is commonly framed by lithography generations—i-line, KrF, and ArF (including 193nm immersion); suppliers explicitly target logic and memory across i-line/KrF/ArF. Key integration requirements include resist compatibility (avoiding intermixing), low outgassing, thermal crosslink/bake behavior and solvent systems, and removability—either via plasma etch transfer or via developable BARC (DBARC) approaches that can reduce or eliminate additional etch steps in selected flows.

Competitively, BARC is a qualification-intensive, sticky ancillary-material segment, concentrated among a small set of global leaders and specialists, frequently sold and qualified as part of a complete lithography material stack. Representative suppliers include Brewer Science (positioning ARC® as the benchmark “original BARC” line spanning i-line to 193nm immersion) , Merck KGaA (BARC for reflectivity control, standing-wave suppression, and topography issues, targeting i-line/KrF/ArF for logic/memory) , TOK (TARC/BARC offerings with explicit statements on PFOS/PFOA-free formulations) , Qnity (organic, thermally cross-linking KrF BARC offerings) , and Honeywell’s historical inorganic BARC path (e.g., DUO inorganic BARC distribution via JSR). Forward trends/drivers include tighter CD/defect requirements as film stacks become more complex, multi-patterning and reflectivity challenges across layers, and sustainability/compliance pressures (PFOS/PFOA/PFAS-related) accelerating formulation evolution and substitution.

This report is a detailed and comprehensive analysis for global Bottom Anti-Reflection Coatings (BARC) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Lithography Technology and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### **Key Features:**

Global Bottom Anti-Reflection Coatings (BARC) market size and forecasts, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Bottom Anti-Reflection Coatings (BARC) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Bottom Anti-Reflection Coatings (BARC) market size and forecasts, by Lithography Technology and by Application, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Bottom Anti-Reflection Coatings (BARC) market shares of main players,

shipments in revenue (\$ Million), sales quantity (MT), and ASP (US\$/Kg), 2021-2026

**The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Bottom Anti-Reflection Coatings (BARC)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Bottom Anti-Reflection Coatings (BARC) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Honeywell, Merck KGaA, TOK, Qnity, Dongjin Semichem, Brewer Science, Nissan Chemical, Allresist GmbH, YCCHEM Co., Ltd, SK Materials Performance (SKMP), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

**Market Segmentation**

Bottom Anti-Reflection Coatings (BARC) market is split by Lithography Technology and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Lithography Technology, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Lithography Technology

i-Line BARC

KrF BARC

ArF BARC

ArFi BARC

EUV BARC

## Market segment by Material

Organic BARC

Inorganic BARC

## Market segment by Application

3D NAND and DRAM BARC

Logic IC BARC

Advanced Packaging BARC

## Major players covered

Honeywell

Merck KGaA

TOK

Qnity

Dongjin Semichem

Brewer Science

Nissan Chemical

Allresist GmbH

YCCHEM Co., Ltd

SK Materials Performance (SKMP)

Red Avenue

Xiamen Hengkun New Material Technology

PhiChem

Market segment by region, regional analysis covers  
North America (United States, Canada, and Mexico)  
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)  
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)  
South America (Brazil, Argentina, Colombia, and Rest of South America)  
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Bottom Anti-Reflection Coatings (BARC) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Bottom Anti-Reflection Coatings (BARC), with price, sales quantity, revenue, and global market share of Bottom Anti-Reflection Coatings (BARC) from 2021 to 2026.

Chapter 3, the Bottom Anti-Reflection Coatings (BARC) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Bottom Anti-Reflection Coatings (BARC) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Lithography Technology and by Application, with sales market share and growth rate by Lithography Technology, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Bottom Anti-Reflection Coatings (BARC) market forecast, by regions, by Lithography Technology, and by Application, with sales and revenue, from 2027 to

2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Bottom Anti-Reflection Coatings (BARC).

Chapter 14 and 15, to describe Bottom Anti-Reflection Coatings (BARC) sales channel, distributors, customers, research findings and conclusion.

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