

Global Silicon Anti-Reflective Coatings (SiARC) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Silicon Anti-Reflective Coatings (SiARC) market size is expected to reach \$ 186 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

Anti-reflection coating (ARC) refers to a coating applied to the bottom or top of a photoresist. It is composed of polymer resin, dye, thermal acid generator, solvent, etc. ARCs include SiARC, BARC, and TARC.

Silicon Anti-Reflective Coatings (SiARC) is an optical functional coating based on silicon materials. By constructing a specific structure or thin film on the surface of the silicon substrate, it uses the principle of optical interference to reduce light reflection losses, thereby improving light transmittance or photon absorption efficiency. Its core goal is to minimize the reflectivity of the silicon substrate surface, which is widely used in Memorys and Logics.

In 2024, the global production of silicon-containing anti-reflective coating (SiARC) will be 65,600 liters, with an average price of 1,492 USD/liter.

Major companies and competitive landscape

SiARC manufacturers include Nissan Chemical Industries, JSR, Honeywell, Shin-Etsu Chemical, Dupont, and Pibond. Nissan Chemical Industries and JSR are ranked first and second, with a combined market share exceeding 54%. Pibond's SiARC has been in mass production for the past two years and has gained a significant market share in China. Pibond also recently established a new plant in Haining, Zhejiang, which can supply a small amount of SiARC to the Chinese market.

The market concentration is high, with an HHI index of approximately 0.21. It is a highly concentrated market with strong technological barriers and is mainly dominated by manufacturers from the United States, Japan, and South Korea.

Generally speaking, SiARC is a key material for photolithography. Driven by advanced processes, the global market maintains steady upward growth; however, the competitive landscape is highly concentrated, and Chinese companies are still in the breakthrough stage.

This report studies the global Silicon Anti-Reflective Coatings (SiARC) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Silicon Anti-Reflective Coatings (SiARC) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Silicon Anti-Reflective Coatings (SiARC) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Silicon Anti-Reflective Coatings (SiARC) total production and demand, 2021-2032, (L)

Global Silicon Anti-Reflective Coatings (SiARC) total production value, 2021-2032, (USD Million)

Global Silicon Anti-Reflective Coatings (SiARC) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (L), (based on production site)

Global Silicon Anti-Reflective Coatings (SiARC) consumption by region & country, CAGR, 2021-2032 & (L)

U.S. VS China: Silicon Anti-Reflective Coatings (SiARC) domestic production, consumption, key domestic manufacturers and share

Global Silicon Anti-Reflective Coatings (SiARC) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (L)

Global Silicon Anti-Reflective Coatings (SiARC) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (L)

Global Silicon Anti-Reflective Coatings (SiARC) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (L)

This report profiles key players in the global Silicon Anti-Reflective Coatings (SiARC) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Nissan Chemical Industries, JSR, Honeywell, Shin-Etsu Chemical, Dupont, Pibond, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Silicon Anti-Reflective Coatings (SiARC) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (L) and average price (US\$/L) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Silicon Anti-Reflective Coatings (SiARC) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Silicon Anti-Reflective Coatings (SiARC) Market, Segmentation by Type:

ArF Dry SiARC

ArF Immersion SiARC

Global Silicon Anti-Reflective Coatings (SiARC) Market, Segmentation by Application:

Memory

Logic

Others

Companies Profiled:

Nissan Chemical Industries

JSR

Honeywell

Shin-Etsu Chemical

Dupont

Pibond

Key Questions Answered:

1. How big is the global Silicon Anti-Reflective Coatings (SiARC) market?

2. What is the demand of the global Silicon Anti-Reflective Coatings (SiARC) market?
3. What is the year over year growth of the global Silicon Anti-Reflective Coatings (SiARC) market?
4. What is the production and production value of the global Silicon Anti-Reflective Coatings (SiARC) market?
5. Who are the key producers in the global Silicon Anti-Reflective Coatings (SiARC) market?
6. What are the growth factors driving the market demand?

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