

Global MLCC-grade Barium Titanate Powder Market Growth 2026-2032

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Abstracts

The global MLCC-grade Barium Titanate Powder market size is predicted to grow from US\$ 476 million in 2025 to US\$ 741 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

MLCC-grade barium titanate powder refers to high-purity functional ceramic powder composed primarily of barium titanate, BaTiO₃, and specifically engineered for use in the dielectric layers and selected electrode co-material applications of multilayer ceramic capacitors. Commercial products are manufactured mainly through solid-state reaction, hydrothermal synthesis and oxalate-based processes, with dry powder representing the mainstream product form and aqueous or organic dispersions serving specialized ultrafine-particle applications. Key specifications include primary particle size, particle size distribution, Ba/Ti molar ratio, purity, crystallinity, tetragonality, specific surface area, agglomeration, dispersibility and sintering compatibility. The market covers merchant sales and captive internal consumption of identifiable BaTiO₃ base powder designed for MLCC production, including lightly modified or customized grades in which barium titanate remains the principal material. Product demand is closely linked to dielectric-layer thinning, higher layer counts, capacitance density, base-metal electrode co-firing and reliability requirements in consumer electronics, automotive electronics, communications infrastructure, data centers, industrial equipment and other high-density electronic systems. Barium titanate remains a critical determinant of MLCC capacitance and voltage-withstand performance.

Key Findings

The average global selling price in 2025 was approximately US\$18.0 per kilogram.

The industry's overall gross margin was estimated at approximately 30%–38%, with ultrafine and application-specific grades generally positioned toward the upper end.

Asia Pacific maintained a dominant position in both production and downstream consumption.

China recorded the fastest capacity expansion, while Japan retained leadership in high-end powder technology and long-term customer qualification.

Automotive Electronics and Communication Infrastructure and Data Centers were the fastest-expanding downstream applications.

Market Trends

The principal development direction is shifting from basic chemical purity toward comprehensive particle engineering. As MLCC dielectric layers move into the submicron range and layer counts increase, powder suppliers must simultaneously control primary particle size, narrow particle size distribution, crystallinity, Ba/Ti stoichiometry, surface condition and sintering behavior. TDK has disclosed that advanced MLCC structures may contain up to approximately 1,000 layers with individual dielectric layers at the submicron level, highlighting why powder consistency and defect control are becoming more commercially important than nominal purity alone.

Solid-state products continue to dominate volume because of their established production economics, broad particle-size availability and suitability for mainstream formulations. Hydrothermal products are gaining value share in ultrafine, high-capacitance and thin-layer applications, while oxalate-process powders remain important in segments requiring chemical homogeneity and controlled crystallization. Dry powder will remain the principal commercial form, although customized dispersions are expected to grow faster as producers seek to reduce hard agglomeration and shorten downstream slurry-processing cycles.

Market Dynamics

Demand is increasingly determined by product mix rather than unit growth in consumer electronics alone. The expansion of automotive electronics, AI servers, data-center power systems, high-speed communications equipment and industrial automation is raising the number, total capacitance and reliability requirements of MLCCs installed in each system. At the same time, continuing dielectric-layer thinning reduces the material

required per individual capacitor, limiting direct conversion of MLCC unit growth into equivalent powder-volume growth.

Supply-side development remains concentrated in Asia. Japanese suppliers continue to invest in MLCC-related materials and high-performance powder technologies, while Chinese producers are expanding domestic production of hydrothermal and solid-state grades. One leading Japanese materials group has disclosed planned investment of JPY5.7 billion in MLCC-related materials, indicating that established suppliers continue to view advanced barium titanate as a strategic growth material.

Drivers

The main demand drivers are MLCC miniaturization, higher capacitance density, increasing electronic content per vehicle, electrification of powertrains, advanced driver-assistance systems, AI computing infrastructure, data-center power conversion and the growing use of electronic control systems in industrial equipment. Higher layer counts and thinner dielectric layers increase requirements for ultrafine, spherical and narrowly distributed particles. High-purity ultrafine barium titanate and related dielectric materials are being developed specifically to support thinner dielectric layers, smaller component dimensions and higher capacitance.

The transition toward higher-voltage, higher-temperature and high-reliability MLCCs also supports value growth. These products require tighter impurity control, stable sintering shrinkage, compatibility with nickel internal electrodes and consistent electrical properties across production batches, creating stronger customer dependence on qualified powder suppliers.

Restraints

The market is constrained by continuous reductions in dielectric-layer thickness and MLCC dimensions, which lower the BaTiO₃ consumption required for each component. Growth in capacitor shipments therefore does not translate proportionally into powder tonnage. In mature consumer-electronics applications, price pressure on standardized solid-state powder can also offset gains from higher sales volume.

Long qualification cycles represent another structural restraint. Changes in powder synthesis route, particle morphology, trace impurities or surface chemistry may affect dielectric reliability and co-firing performance. MLCC producers are therefore cautious when replacing approved material grades, making customer acquisition slow and

increasing the cost of commercializing new production capacity.

Opportunities

The strongest opportunity lies in ultrafine powder for high-layer-count, high-capacitance and compact MLCCs. Hydrothermal powders with controlled particle sizes at or below 100nm, customized Ba/Ti ratios, high crystallinity and low agglomeration are positioned to capture higher selling prices. Additional opportunities exist in electrode-layer co-materials, tailored dispersions and surface-modified powders designed to improve sintering compatibility.

Automotive-grade and data-center-oriented MLCC supply chains also offer attractive entry points. These applications place greater emphasis on reliability, temperature stability, voltage endurance and traceability than mainstream consumer products. New capacity that completes customer qualification and achieves consistent mass production may therefore generate higher value than undifferentiated expansion in conventional powder.

Challenges

The principal technical challenge is balancing particle miniaturization with crystallinity and dielectric performance. Extremely small particles may exhibit lower tetragonality, greater surface activity and a higher tendency to agglomerate, creating difficulties in dispersion, slurry formulation and sintering. Manufacturers must also maintain precise stoichiometry and low trace-metal contamination across large production batches.

Commercial challenges include volatile utilization rates, lengthy customer certification, dependence on a limited number of major MLCC buyers and substantial capital requirements for high-purity raw materials, reaction systems, calcination, classification and contamination-controlled processing. Rapid capacity additions may create pricing pressure in standardized grades before high-end demand absorbs new supply.

Industry Chain Analysis

The upstream industry consists primarily of high-purity barium sources, titanium sources, process chemicals, dispersants and specialized production equipment. High-purity barium carbonate, barium hydroxide and titanium dioxide are important inputs, while hydrothermal systems, reactors, calcination furnaces, pulverizers, classifiers and contamination-control equipment determine product consistency. Raw-material purity

and the stability of the Ba/Ti ratio directly affect dielectric properties and downstream qualification.

Midstream suppliers synthesize, calcine, mill, classify, surface-treat and disperse BaTiO₃ powder before delivery to MLCC material formulators or vertically integrated capacitor manufacturers. Downstream processing includes dielectric formulation, slurry preparation, tape casting, printing, stacking, lamination, debinding, co-firing, termination and electrical testing. The final demand originates from consumer electronics, vehicles, communication equipment, data centers, industrial electronics, aerospace and medical systems.

Value Chain Analysis

Value creation is concentrated in synthesis-process control, particle engineering, formulation compatibility and customer qualification rather than in the basic chemical composition alone. Standard solid-state powder occupies the lower and middle price bands, while hydrothermal, ultrafine, narrowly distributed and application-specific products command premium pricing. Additional value is created through customized particle size, Ba/Ti ratio, dopant compatibility, dispersion systems and technical support during dielectric formulation.

Captive production is an important part of the value chain. Major MLCC manufacturers may produce powder internally or procure it through affiliated material companies to protect formulations, stabilize supply and coordinate powder properties with proprietary manufacturing processes. This reduces the observable merchant market but increases the strategic value of barium titanate technology within vertically integrated groups.

Segment Insights

By synthesis route, Solid State Reaction remains the largest segment by shipment volume due to its scalability, mature process economics and broad compatibility with standard MLCC formulations. Hydrothermal Synthesis occupies the higher-value segment and is expected to gain share in ultrafine and thin-layer applications. Oxalate Process products maintain a defensible position where chemical homogeneity and controlled crystallization are prioritized.

By primary particle size, the Up to 100 nm category represents the most technologically intensive segment and the principal source of product-mix improvement. Above 100 nm to 200 nm serves a broad range of high-capacitance products, while larger-particle

grades remain relevant to conventional and thicker-layer applications. Dry Powder dominates product form, Dielectric Layer Base Powder accounts for most consumption, and External Merchant Sales remains larger than Captive Internal Consumption despite the latter representing approximately 28% of total market value.

Downstream Market Opportunities

Automotive Electronics offers sustained opportunities through electric powertrains, battery-management systems, onboard chargers, inverters, ADAS, infotainment and body electronics. Communication Infrastructure and Data Centers are expanding more rapidly as AI accelerators, servers, networking systems and high-density power supplies require greater MLCC content and total installed capacitance. Industrial and Power Electronics provide a more stable demand base, particularly in automation, robotics, renewable-energy inverters, charging infrastructure and advanced power supplies.

Consumer Electronics remains a major volume market but is relatively mature and more exposed to inventory cycles and price competition. Aerospace and Medical Electronics are smaller in volume but offer opportunities for highly reliable, traceable and tightly controlled material grades.

Regional Insights

Asia Pacific dominates the industry because it contains most global MLCC manufacturing capacity, major powder suppliers and the principal electronics production clusters. Japan maintains the strongest position in high-end material technology, hydrothermal and oxalate-process know-how, precision particle control and long-term customer qualification. China has become the fastest-expanding production region, supported by domestic MLCC localization, investment in electronic ceramic materials and growing capabilities in both hydrothermal and solid-state powder.

China Taiwan maintains a vertically integrated supply structure spanning powder, dielectric formulations and MLCC production. North America and Europe account for a smaller share of volume but retain specialized capabilities in custom nanopowders, solid-state electroceramic materials and application-specific dispersions. South Korea is a major MLCC manufacturing region, although its identifiable independent merchant supply of MLCC-grade barium titanate remains limited because more material activity is embedded within vertically integrated capacitor groups.

Competitive Landscape Analysis

The competitive landscape is moderately concentrated among Japanese and Chinese suppliers, while the observable merchant market is more concentrated than total production because a meaningful portion of powder is manufactured for internal consumption. Japanese participants lead in high-end particle control, process know-how and qualification depth, whereas Chinese suppliers have strengthened their position through larger-scale manufacturing, localization and capacity investment. North American and European participants generally compete in custom, specialized or smaller-volume products rather than mainstream high-volume supply.

Competition increasingly centers on particle consistency, batch stability, defect control, formulation compatibility and technical service rather than nominal production capacity. The verified competitive universe comprises 13 core supplier groups, supplemented by specialized producers, regional manufacturers and captive internal production. New entrants may establish manufacturing capability relatively quickly, but obtaining stable high-end customer qualification remains the principal barrier to achieving meaningful commercial share.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global MLCC-grade Barium Titanate Powder 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 MLCC-grade Barium Titanate Powder portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global MLCC-grade Barium Titanate Powder market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for MLCC-grade Barium Titanate Powder and breaks down

the forecast by Synthesis Route, 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 MLCC-grade Barium Titanate Powder.

This report presents a comprehensive overview, market shares, and growth opportunities of MLCC-grade Barium Titanate Powder market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Synthesis Route:

Hydrothermal Synthesis

Solid State Reaction

Oxalate Process

Others

Segmentation by Primary Particle Size:

Up to 100 nm

Above 100 nm to 200 nm

Above 200 nm to 400 nm

Above 400 nm

Segmentation by Nominal BaTiO₃ Purity:

99.9% and Above

99.5% to Below 99.9%

98.0% to Below 99.5%

Others

Segmentation by Application:

Consumer Electronics

Automotive Electronics

Communication Infrastructure and Data Centers

Industrial and Power Electronics

Aerospace and Medical Electronics

Others

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.

Shandong Sinocera Functional Materials Co., Ltd.

SAKAI CHEMICAL INDUSTRY CO., LTD.

MF Material Co., Ltd.

Nippon Chemical Industrial Co., Ltd.

KCM Corporation

Otsuka Chemical Co., Ltd.

Xiamen Tungsten Co., Ltd.

Prosperity Dielectrics Co., Ltd.

Vibrantz Technologies Inc.

TODA KOGYO CORP.

Yuanjie New Materials Technology Zhejiang Co., Ltd.

Titanates Ltd

WuXi Noble Electronics Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global MLCC-grade Barium Titanate Powder market?

What factors are driving MLCC-grade Barium Titanate Powder market growth, globally and by region?

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

How do MLCC-grade Barium Titanate Powder market opportunities vary by end

market size?

How does MLCC-grade Barium Titanate Powder break out by Synthesis Route,
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 MLCC-grade Barium Titanate Powder Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for MLCC-grade Barium Titanate Powder by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for MLCC-grade Barium Titanate Powder by Country/Region, 2021, 2025 & 2032

2.2 MLCC-grade Barium Titanate Powder Segment by Synthesis Route

- 2.2.1 Hydrothermal Synthesis
- 2.2.2 Solid State Reaction
- 2.2.3 Oxalate Process
- 2.2.4 Others
- 2.2.5 MLCC-grade Barium Titanate Powder Sales by Synthesis Route
 - 2.2.5.1 Global MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)
 - 2.2.5.2 Global MLCC-grade Barium Titanate Powder Revenue and Market Share by Synthesis Route (2021-2026)
 - 2.2.5.3 Global MLCC-grade Barium Titanate Powder Sale Price by Synthesis Route (2021-2026)

2.3 MLCC-grade Barium Titanate Powder Segment by Primary Particle Size

- 2.3.1 Up to 100 nm
- 2.3.2 Above 100 nm to 200 nm
- 2.3.3 Above 200 nm to 400 nm
- 2.3.4 Above 400 nm
- 2.3.5 MLCC-grade Barium Titanate Powder Sales by Primary Particle Size

2.3.5.1 Global MLCC-grade Barium Titanate Powder Sales Market Share by Primary Particle Size (2021-2026)

2.3.5.2 Global MLCC-grade Barium Titanate Powder Revenue and Market Share by Primary Particle Size (2021-2026)

2.3.5.3 Global MLCC-grade Barium Titanate Powder Sale Price by Primary Particle Size (2021-2026)

2.4 MLCC-grade Barium Titanate Powder Segment by Nominal BaTiO₃ Purity

2.4.1 99.9% and Above

2.4.2 99.5% to Below 99.9%

2.4.3 98.0% to Below 99.5%

2.4.4 Others

2.4.5 MLCC-grade Barium Titanate Powder Sales by Nominal BaTiO₃ Purity

2.4.5.1 Global MLCC-grade Barium Titanate Powder Sales Market Share by Nominal BaTiO₃ Purity (2021-2026)

2.4.5.2 Global MLCC-grade Barium Titanate Powder Revenue and Market Share by Nominal BaTiO₃ Purity (2021-2026)

2.4.5.3 Global MLCC-grade Barium Titanate Powder Sale Price by Nominal BaTiO₃ Purity (2021-2026)

2.5 MLCC-grade Barium Titanate Powder Segment by Application

2.5.1 Consumer Electronics

2.5.2 Automotive Electronics

2.5.3 Communication Infrastructure and Data Centers

2.5.4 Industrial and Power Electronics

2.5.5 Aerospace and Medical Electronics

2.5.6 Others

2.5.7 MLCC-grade Barium Titanate Powder Sales by Application

2.5.7.1 Global MLCC-grade Barium Titanate Powder Sale Market Share by Application (2021-2026)

2.5.7.2 Global MLCC-grade Barium Titanate Powder Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global MLCC-grade Barium Titanate Powder Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global MLCC-grade Barium Titanate Powder Breakdown Data by Company

3.1.1 Global MLCC-grade Barium Titanate Powder Annual Sales by Company (2021-2026)

3.1.2 Global MLCC-grade Barium Titanate Powder Sales Market Share by Company

(2021-2026)

3.2 Global MLCC-grade Barium Titanate Powder Annual Revenue by Company

(2021-2026)

3.2.1 Global MLCC-grade Barium Titanate Powder Revenue by Company (2021-2026)

3.2.2 Global MLCC-grade Barium Titanate Powder Revenue Market Share by Company (2021-2026)

3.3 Global MLCC-grade Barium Titanate Powder Sale Price by Company

3.4 Key Manufacturers MLCC-grade Barium Titanate Powder Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers MLCC-grade Barium Titanate Powder Product Location Distribution

3.4.2 Players MLCC-grade Barium Titanate Powder 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 MLCC-GRADE BARIUM TITANATE POWDER BY GEOGRAPHIC REGION

4.1 World Historic MLCC-grade Barium Titanate Powder Market Size by Geographic Region (2021-2026)

4.1.1 Global MLCC-grade Barium Titanate Powder Annual Sales by Geographic Region (2021-2026)

4.1.2 Global MLCC-grade Barium Titanate Powder Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic MLCC-grade Barium Titanate Powder Market Size by Country/Region (2021-2026)

4.2.1 Global MLCC-grade Barium Titanate Powder Annual Sales by Country/Region (2021-2026)

4.2.2 Global MLCC-grade Barium Titanate Powder Annual Revenue by Country/Region (2021-2026)

4.3 Americas MLCC-grade Barium Titanate Powder Sales Growth

4.4 APAC MLCC-grade Barium Titanate Powder Sales Growth

4.5 Europe MLCC-grade Barium Titanate Powder Sales Growth

4.6 Middle East & Africa MLCC-grade Barium Titanate Powder Sales Growth

5 AMERICAS

5.1 Americas MLCC-grade Barium Titanate Powder Sales by Country

5.1.1 Americas MLCC-grade Barium Titanate Powder Sales by Country (2021-2026)

5.1.2 Americas MLCC-grade Barium Titanate Powder Revenue by Country
(2021-2026)

5.2 Americas MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026)

5.3 Americas MLCC-grade Barium Titanate Powder Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC MLCC-grade Barium Titanate Powder Sales by Region

6.1.1 APAC MLCC-grade Barium Titanate Powder Sales by Region (2021-2026)

6.1.2 APAC MLCC-grade Barium Titanate Powder Revenue by Region (2021-2026)

6.2 APAC MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026)

6.3 APAC MLCC-grade Barium Titanate Powder 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 MLCC-grade Barium Titanate Powder by Country

7.1.1 Europe MLCC-grade Barium Titanate Powder Sales by Country (2021-2026)

7.1.2 Europe MLCC-grade Barium Titanate Powder Revenue by Country (2021-2026)

7.2 Europe MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026)

7.3 Europe MLCC-grade Barium Titanate Powder 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 MLCC-grade Barium Titanate Powder by Country

8.1.1 Middle East & Africa MLCC-grade Barium Titanate Powder Sales by Country
(2021-2026)

8.1.2 Middle East & Africa MLCC-grade Barium Titanate Powder Revenue by Country
(2021-2026)

8.2 Middle East & Africa MLCC-grade Barium Titanate Powder Sales by Synthesis
Route (2021-2026)

8.3 Middle East & Africa MLCC-grade Barium Titanate Powder 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 MLCC-grade Barium Titanate Powder

10.3 Manufacturing Process Analysis of MLCC-grade Barium Titanate Powder

10.4 Industry Chain Structure of MLCC-grade Barium Titanate Powder

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 MLCC-grade Barium Titanate Powder Distributors

11.3 MLCC-grade Barium Titanate Powder Customer

12 WORLD FORECAST REVIEW FOR MLCC-GRADE BARIUM TITANATE POWDER BY GEOGRAPHIC REGION

12.1 Global MLCC-grade Barium Titanate Powder Market Size Forecast by Region

12.1.1 Global MLCC-grade Barium Titanate Powder Forecast by Region (2027-2032)

12.1.2 Global MLCC-grade Barium Titanate Powder 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 MLCC-grade Barium Titanate Powder Forecast by Synthesis Route (2027-2032)

12.7 Global MLCC-grade Barium Titanate Powder Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Shandong Sinocera Functional Materials Co., Ltd.

13.1.1 Shandong Sinocera Functional Materials Co., Ltd. Company Information

13.1.2 Shandong Sinocera Functional Materials Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.1.3 Shandong Sinocera Functional Materials Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Shandong Sinocera Functional Materials Co., Ltd. Main Business Overview

13.1.5 Shandong Sinocera Functional Materials Co., Ltd. Latest Developments

13.2 SAKAI CHEMICAL INDUSTRY CO., LTD.

13.2.1 SAKAI CHEMICAL INDUSTRY CO., LTD. Company Information

13.2.2 SAKAI CHEMICAL INDUSTRY CO., LTD. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.2.3 SAKAI CHEMICAL INDUSTRY CO., LTD. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 SAKAI CHEMICAL INDUSTRY CO., LTD. Main Business Overview

13.2.5 SAKAI CHEMICAL INDUSTRY CO., LTD. Latest Developments

13.3 MF Material Co., Ltd.

13.3.1 MF Material Co., Ltd. Company Information

13.3.2 MF Material Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.3.3 MF Material Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 MF Material Co., Ltd. Main Business Overview

13.3.5 MF Material Co., Ltd. Latest Developments

13.4 Nippon Chemical Industrial Co., Ltd.

13.4.1 Nippon Chemical Industrial Co., Ltd. Company Information

13.4.2 Nippon Chemical Industrial Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.4.3 Nippon Chemical Industrial Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Nippon Chemical Industrial Co., Ltd. Main Business Overview

13.4.5 Nippon Chemical Industrial Co., Ltd. Latest Developments

13.5 KCM Corporation

13.5.1 KCM Corporation Company Information

13.5.2 KCM Corporation MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.5.3 KCM Corporation MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 KCM Corporation Main Business Overview

13.5.5 KCM Corporation Latest Developments

13.6 Otsuka Chemical Co., Ltd.

13.6.1 Otsuka Chemical Co., Ltd. Company Information

13.6.2 Otsuka Chemical Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.6.3 Otsuka Chemical Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Otsuka Chemical Co., Ltd. Main Business Overview

13.6.5 Otsuka Chemical Co., Ltd. Latest Developments

13.7 Xiamen Tungsten Co., Ltd.

13.7.1 Xiamen Tungsten Co., Ltd. Company Information

13.7.2 Xiamen Tungsten Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.7.3 Xiamen Tungsten Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Xiamen Tungsten Co., Ltd. Main Business Overview

13.7.5 Xiamen Tungsten Co., Ltd. Latest Developments

13.8 Prosperity Dielectrics Co., Ltd.

13.8.1 Prosperity Dielectrics Co., Ltd. Company Information

13.8.2 Prosperity Dielectrics Co., Ltd. MLCC-grade Barium Titanate Powder Product

Portfolios and Specifications

13.8.3 Prosperity Dielectrics Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Prosperity Dielectrics Co., Ltd. Main Business Overview

13.8.5 Prosperity Dielectrics Co., Ltd. Latest Developments

13.9 Vibrantz Technologies Inc.

13.9.1 Vibrantz Technologies Inc. Company Information

13.9.2 Vibrantz Technologies Inc. MLCC-grade Barium Titanate Powder Product

Portfolios and Specifications

13.9.3 Vibrantz Technologies Inc. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Vibrantz Technologies Inc. Main Business Overview

13.9.5 Vibrantz Technologies Inc. Latest Developments

13.10 TODA KOGYO CORP.

13.10.1 TODA KOGYO CORP. Company Information

13.10.2 TODA KOGYO CORP. MLCC-grade Barium Titanate Powder Product

Portfolios and Specifications

13.10.3 TODA KOGYO CORP. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 TODA KOGYO CORP. Main Business Overview

13.10.5 TODA KOGYO CORP. Latest Developments

13.11 Yuanjie New Materials Technology Zhejiang Co., Ltd.

13.11.1 Yuanjie New Materials Technology Zhejiang Co., Ltd. Company Information

13.11.2 Yuanjie New Materials Technology Zhejiang Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.11.3 Yuanjie New Materials Technology Zhejiang Co., Ltd. MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Yuanjie New Materials Technology Zhejiang Co., Ltd. Main Business Overview

13.11.5 Yuanjie New Materials Technology Zhejiang Co., Ltd. Latest Developments

13.12 Titanates Ltd

13.12.1 Titanates Ltd Company Information

13.12.2 Titanates Ltd MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

13.12.3 Titanates Ltd MLCC-grade Barium Titanate Powder Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Titanates Ltd Main Business Overview

13.12.5 Titanates Ltd Latest Developments

13.13 WuXi Noble Electronics Co., Ltd.

13.13.1 WuXi Noble Electronics Co., Ltd. Company Information

13.13.2 WuXi Noble Electronics Co., Ltd. MLCC-grade Barium Titanate Powder
Product Portfolios and Specifications

13.13.3 WuXi Noble Electronics Co., Ltd. MLCC-grade Barium Titanate Powder Sales,
Revenue, Price and Gross Margin (2021-2026)

13.13.4 WuXi Noble Electronics Co., Ltd. Main Business Overview

13.13.5 WuXi Noble Electronics Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. MLCC-grade Barium Titanate Powder Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. MLCC-grade Barium Titanate Powder Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Hydrothermal Synthesis

Table 4. Major Players of Solid State Reaction

Table 5. Major Players of Oxalate Process

Table 6. Major Players of Others

Table 7. Global MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026) & (Tons)

Table 8. Global MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)

Table 9. Global MLCC-grade Barium Titanate Powder Revenue by Synthesis Route (2021-2026) & (\$ million)

Table 10. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Synthesis Route (2021-2026)

Table 11. Global MLCC-grade Barium Titanate Powder Sale Price by Synthesis Route (2021-2026) & (US\$/kg)

Table 12. Major Players of Up to 100 nm

Table 13. Major Players of Above 100 nm to 200 nm

Table 14. Major Players of Above 200 nm to 400 nm

Table 15. Major Players of Above 400 nm

Table 16. Global MLCC-grade Barium Titanate Powder Sales by Primary Particle Size (2021-2026) & (Tons)

Table 17. Global MLCC-grade Barium Titanate Powder Sales Market Share by Primary Particle Size (2021-2026)

Table 18. Global MLCC-grade Barium Titanate Powder Revenue by Primary Particle Size (2021-2026) & (\$ million)

Table 19. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Primary Particle Size (2021-2026)

Table 20. Global MLCC-grade Barium Titanate Powder Sale Price by Primary Particle Size (2021-2026) & (US\$/kg)

Table 21. Major Players of 99.9% and Above

Table 22. Major Players of 99.5% to Below 99.9%

Table 23. Major Players of 98.0% to Below 99.5%

Table 24. Major Players of Others

Table 25. Global MLCC-grade Barium Titanate Powder Sales by Nominal BaTiO₃ Purity (2021-2026) & (Tons)

Table 26. Global MLCC-grade Barium Titanate Powder Sales Market Share by Nominal BaTiO₃ Purity (2021-2026)

Table 27. Global MLCC-grade Barium Titanate Powder Revenue by Nominal BaTiO₃ Purity (2021-2026) & (\$ million)

Table 28. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Nominal BaTiO₃ Purity (2021-2026)

Table 29. Global MLCC-grade Barium Titanate Powder Sale Price by Nominal BaTiO₃ Purity (2021-2026) & (US\$/kg)

Table 30. Global MLCC-grade Barium Titanate Powder Sale by Application (2021-2026) & (Tons)

Table 31. Global MLCC-grade Barium Titanate Powder Sale Market Share by Application (2021-2026)

Table 32. Global MLCC-grade Barium Titanate Powder Revenue by Application (2021-2026) & (\$ million)

Table 33. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Application (2021-2026)

Table 34. Global MLCC-grade Barium Titanate Powder Sale Price by Application (2021-2026) & (US\$/kg)

Table 35. Global MLCC-grade Barium Titanate Powder Sales by Company (2021-2026) & (Tons)

Table 36. Global MLCC-grade Barium Titanate Powder Sales Market Share by Company (2021-2026)

Table 37. Global MLCC-grade Barium Titanate Powder Revenue by Company (2021-2026) & (\$ millions)

Table 38. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Company (2021-2026)

Table 39. Global MLCC-grade Barium Titanate Powder Sale Price by Company (2021-2026) & (US\$/kg)

Table 40. Key Manufacturers MLCC-grade Barium Titanate Powder Producing Area Distribution and Sales Area

Table 41. Players MLCC-grade Barium Titanate Powder Products Offered

Table 42. MLCC-grade Barium Titanate Powder Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 43. New Products and Potential Entrants

Table 44. Market M&A Activity & Strategy

Table 45. Global MLCC-grade Barium Titanate Powder Sales by Geographic Region

(2021-2026) & (Tons)

Table 46. Global MLCC-grade Barium Titanate Powder Sales Market Share Geographic Region (2021-2026)

Table 47. Global MLCC-grade Barium Titanate Powder Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 48. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Geographic Region (2021-2026)

Table 49. Global MLCC-grade Barium Titanate Powder Sales by Country/Region (2021-2026) & (Tons)

Table 50. Global MLCC-grade Barium Titanate Powder Sales Market Share by Country/Region (2021-2026)

Table 51. Global MLCC-grade Barium Titanate Powder Revenue by Country/Region (2021-2026) & (\$ millions)

Table 52. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Country/Region (2021-2026)

Table 53. Americas MLCC-grade Barium Titanate Powder Sales by Country (2021-2026) & (Tons)

Table 54. Americas MLCC-grade Barium Titanate Powder Sales Market Share by Country (2021-2026)

Table 55. Americas MLCC-grade Barium Titanate Powder Revenue by Country (2021-2026) & (\$ millions)

Table 56. Americas MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026) & (Tons)

Table 57. Americas MLCC-grade Barium Titanate Powder Sales by Application (2021-2026) & (Tons)

Table 58. APAC MLCC-grade Barium Titanate Powder Sales by Region (2021-2026) & (Tons)

Table 59. APAC MLCC-grade Barium Titanate Powder Sales Market Share by Region (2021-2026)

Table 60. APAC MLCC-grade Barium Titanate Powder Revenue by Region (2021-2026) & (\$ millions)

Table 61. APAC MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026) & (Tons)

Table 62. APAC MLCC-grade Barium Titanate Powder Sales by Application (2021-2026) & (Tons)

Table 63. Europe MLCC-grade Barium Titanate Powder Sales by Country (2021-2026) & (Tons)

Table 64. Europe MLCC-grade Barium Titanate Powder Revenue by Country (2021-2026) & (\$ millions)

Table 65. Europe MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026) & (Tons)

Table 66. Europe MLCC-grade Barium Titanate Powder Sales by Application (2021-2026) & (Tons)

Table 67. Middle East & Africa MLCC-grade Barium Titanate Powder Sales by Country (2021-2026) & (Tons)

Table 68. Middle East & Africa MLCC-grade Barium Titanate Powder Revenue Market Share by Country (2021-2026)

Table 69. Middle East & Africa MLCC-grade Barium Titanate Powder Sales by Synthesis Route (2021-2026) & (Tons)

Table 70. Middle East & Africa MLCC-grade Barium Titanate Powder Sales by Application (2021-2026) & (Tons)

Table 71. Key Market Drivers & Growth Opportunities of MLCC-grade Barium Titanate Powder

Table 72. Key Market Challenges & Risks of MLCC-grade Barium Titanate Powder

Table 73. Key Industry Trends of MLCC-grade Barium Titanate Powder

Table 74. MLCC-grade Barium Titanate Powder Raw Material

Table 75. Key Suppliers of Raw Materials

Table 76. MLCC-grade Barium Titanate Powder Distributors List

Table 77. MLCC-grade Barium Titanate Powder Customer List

Table 78. Global MLCC-grade Barium Titanate Powder Sales Forecast by Region (2027-2032) & (Tons)

Table 79. Global MLCC-grade Barium Titanate Powder Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Americas MLCC-grade Barium Titanate Powder Sales Forecast by Country (2027-2032) & (Tons)

Table 81. Americas MLCC-grade Barium Titanate Powder Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. APAC MLCC-grade Barium Titanate Powder Sales Forecast by Region (2027-2032) & (Tons)

Table 83. APAC MLCC-grade Barium Titanate Powder Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 84. Europe MLCC-grade Barium Titanate Powder Sales Forecast by Country (2027-2032) & (Tons)

Table 85. Europe MLCC-grade Barium Titanate Powder Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Middle East & Africa MLCC-grade Barium Titanate Powder Sales Forecast by Country (2027-2032) & (Tons)

Table 87. Middle East & Africa MLCC-grade Barium Titanate Powder Revenue Forecast

by Country (2027-2032) & (\$ millions)

Table 88. Global MLCC-grade Barium Titanate Powder Sales Forecast by Synthesis Route (2027-2032) & (Tons)

Table 89. Global MLCC-grade Barium Titanate Powder Revenue Forecast by Synthesis Route (2027-2032) & (\$ millions)

Table 90. Global MLCC-grade Barium Titanate Powder Sales Forecast by Application (2027-2032) & (Tons)

Table 91. Global MLCC-grade Barium Titanate Powder Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 92. Shandong Sinocera Functional Materials Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 93. Shandong Sinocera Functional Materials Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 94. Shandong Sinocera Functional Materials Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 95. Shandong Sinocera Functional Materials Co., Ltd. Main Business

Table 96. Shandong Sinocera Functional Materials Co., Ltd. Latest Developments

Table 97. SAKAI CHEMICAL INDUSTRY CO., LTD. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 98. SAKAI CHEMICAL INDUSTRY CO., LTD. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 99. SAKAI CHEMICAL INDUSTRY CO., LTD. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 100. SAKAI CHEMICAL INDUSTRY CO., LTD. Main Business

Table 101. SAKAI CHEMICAL INDUSTRY CO., LTD. Latest Developments

Table 102. MF Material Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 103. MF Material Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 104. MF Material Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 105. MF Material Co., Ltd. Main Business

Table 106. MF Material Co., Ltd. Latest Developments

Table 107. Nippon Chemical Industrial Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 108. Nippon Chemical Industrial Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 109. Nippon Chemical Industrial Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 110. Nippon Chemical Industrial Co., Ltd. Main Business

Table 111. Nippon Chemical Industrial Co., Ltd. Latest Developments

Table 112. KCM Corporation Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 113. KCM Corporation MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 114. KCM Corporation MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 115. KCM Corporation Main Business

Table 116. KCM Corporation Latest Developments

Table 117. Otsuka Chemical Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 118. Otsuka Chemical Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 119. Otsuka Chemical Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 120. Otsuka Chemical Co., Ltd. Main Business

Table 121. Otsuka Chemical Co., Ltd. Latest Developments

Table 122. Xiamen Tungsten Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 123. Xiamen Tungsten Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 124. Xiamen Tungsten Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 125. Xiamen Tungsten Co., Ltd. Main Business

Table 126. Xiamen Tungsten Co., Ltd. Latest Developments

Table 127. Prosperity Dielectrics Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 128. Prosperity Dielectrics Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 129. Prosperity Dielectrics Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 130. Prosperity Dielectrics Co., Ltd. Main Business

Table 131. Prosperity Dielectrics Co., Ltd. Latest Developments

Table 132. Vibrantz Technologies Inc. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 133. Vibrantz Technologies Inc. MLCC-grade Barium Titanate Powder Product

Portfolios and Specifications

Table 134. Vibrantz Technologies Inc. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 135. Vibrantz Technologies Inc. Main Business

Table 136. Vibrantz Technologies Inc. Latest Developments

Table 137. TODA KOGYO CORP. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 138. TODA KOGYO CORP. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 139. TODA KOGYO CORP. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 140. TODA KOGYO CORP. Main Business

Table 141. TODA KOGYO CORP. Latest Developments

Table 142. Yuanjie New Materials Technology Zhejiang Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 143. Yuanjie New Materials Technology Zhejiang Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 144. Yuanjie New Materials Technology Zhejiang Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 145. Yuanjie New Materials Technology Zhejiang Co., Ltd. Main Business

Table 146. Yuanjie New Materials Technology Zhejiang Co., Ltd. Latest Developments

Table 147. Titanates Ltd Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 148. Titanates Ltd MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 149. Titanates Ltd MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 150. Titanates Ltd Main Business

Table 151. Titanates Ltd Latest Developments

Table 152. WuXi Noble Electronics Co., Ltd. Basic Information, MLCC-grade Barium Titanate Powder Manufacturing Base, Sales Area and Its Competitors

Table 153. WuXi Noble Electronics Co., Ltd. MLCC-grade Barium Titanate Powder Product Portfolios and Specifications

Table 154. WuXi Noble Electronics Co., Ltd. MLCC-grade Barium Titanate Powder Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 155. WuXi Noble Electronics Co., Ltd. Main Business

Table 156. WuXi Noble Electronics Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of MLCC-grade Barium Titanate Powder
- Figure 2. MLCC-grade Barium Titanate Powder Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global MLCC-grade Barium Titanate Powder Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global MLCC-grade Barium Titanate Powder Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. MLCC-grade Barium Titanate Powder Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. MLCC-grade Barium Titanate Powder Sales Market Share by Country/Region (2025)
- Figure 10. MLCC-grade Barium Titanate Powder Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Hydrothermal Synthesis
- Figure 12. Product Picture of Solid State Reaction
- Figure 13. Product Picture of Oxalate Process
- Figure 14. Product Picture of Others
- Figure 15. Global MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route in 2026
- Figure 16. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Synthesis Route (2021-2026)
- Figure 17. Product Picture of Up to 100 nm
- Figure 18. Product Picture of Above 100 nm to 200 nm
- Figure 19. Product Picture of Above 200 nm to 400 nm
- Figure 20. Product Picture of Above 400 nm
- Figure 21. Global MLCC-grade Barium Titanate Powder Sales Market Share by Primary Particle Size in 2026
- Figure 22. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Primary Particle Size (2021-2026)
- Figure 23. Product Picture of 99.9% and Above
- Figure 24. Product Picture of 99.5% to Below 99.9%
- Figure 25. Product Picture of 98.0% to Below 99.5%
- Figure 26. Product Picture of Others

Figure 27. Global MLCC-grade Barium Titanate Powder Sales Market Share by Nominal BaTiO₃ Purity in 2026

Figure 28. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Nominal BaTiO₃ Purity (2021-2026)

Figure 29. MLCC-grade Barium Titanate Powder Consumed in Consumer Electronics

Figure 30. Global MLCC-grade Barium Titanate Powder Market: Consumer Electronics (2021-2026) & (Tons)

Figure 31. MLCC-grade Barium Titanate Powder Consumed in Automotive Electronics

Figure 32. Global MLCC-grade Barium Titanate Powder Market: Automotive Electronics (2021-2026) & (Tons)

Figure 33. MLCC-grade Barium Titanate Powder Consumed in Communication Infrastructure and Data Centers

Figure 34. Global MLCC-grade Barium Titanate Powder Market: Communication Infrastructure and Data Centers (2021-2026) & (Tons)

Figure 35. MLCC-grade Barium Titanate Powder Consumed in Industrial and Power Electronics

Figure 36. Global MLCC-grade Barium Titanate Powder Market: Industrial and Power Electronics (2021-2026) & (Tons)

Figure 37. MLCC-grade Barium Titanate Powder Consumed in Aerospace and Medical Electronics

Figure 38. Global MLCC-grade Barium Titanate Powder Market: Aerospace and Medical Electronics (2021-2026) & (Tons)

Figure 39. MLCC-grade Barium Titanate Powder Consumed in Others

Figure 40. Global MLCC-grade Barium Titanate Powder Market: Others (2021-2026) & (Tons)

Figure 41. Global MLCC-grade Barium Titanate Powder Sale Market Share by Application (2025)

Figure 42. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Application in 2025

Figure 43. MLCC-grade Barium Titanate Powder Sales by Company in 2025 (Tons)

Figure 44. Global MLCC-grade Barium Titanate Powder Sales Market Share by Company in 2025

Figure 45. MLCC-grade Barium Titanate Powder Revenue by Company in 2025 (\$ millions)

Figure 46. Global MLCC-grade Barium Titanate Powder Revenue Market Share by Company in 2025

Figure 47. Global MLCC-grade Barium Titanate Powder Sales Market Share by Geographic Region (2021-2026)

Figure 48. Global MLCC-grade Barium Titanate Powder Revenue Market Share by

Geographic Region in 2025

Figure 49. Americas MLCC-grade Barium Titanate Powder Sales 2021-2026 (Tons)

Figure 50. Americas MLCC-grade Barium Titanate Powder Revenue 2021-2026 (\$ millions)

Figure 51. APAC MLCC-grade Barium Titanate Powder Sales 2021-2026 (Tons)

Figure 52. APAC MLCC-grade Barium Titanate Powder Revenue 2021-2026 (\$ millions)

Figure 53. Europe MLCC-grade Barium Titanate Powder Sales 2021-2026 (Tons)

Figure 54. Europe MLCC-grade Barium Titanate Powder Revenue 2021-2026 (\$ millions)

Figure 55. Middle East & Africa MLCC-grade Barium Titanate Powder Sales 2021-2026 (Tons)

Figure 56. Middle East & Africa MLCC-grade Barium Titanate Powder Revenue 2021-2026 (\$ millions)

Figure 57. Americas MLCC-grade Barium Titanate Powder Sales Market Share by Country in 2025

Figure 58. Americas MLCC-grade Barium Titanate Powder Revenue Market Share by Country (2021-2026)

Figure 59. Americas MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)

Figure 60. Americas MLCC-grade Barium Titanate Powder Sales Market Share by Application (2021-2026)

Figure 61. United States MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 62. Canada MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 63. Mexico MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 64. Brazil MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 65. APAC MLCC-grade Barium Titanate Powder Sales Market Share by Region in 2025

Figure 66. APAC MLCC-grade Barium Titanate Powder Revenue Market Share by Region (2021-2026)

Figure 67. APAC MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)

Figure 68. APAC MLCC-grade Barium Titanate Powder Sales Market Share by Application (2021-2026)

Figure 69. China MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 70. Japan MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 71. South Korea MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 72. Southeast Asia MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 73. India MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 74. Australia MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 75. China Taiwan MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 76. Europe MLCC-grade Barium Titanate Powder Sales Market Share by Country in 2025

Figure 77. Europe MLCC-grade Barium Titanate Powder Revenue Market Share by Country (2021-2026)

Figure 78. Europe MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)

Figure 79. Europe MLCC-grade Barium Titanate Powder Sales Market Share by Application (2021-2026)

Figure 80. Germany MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 81. France MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 82. UK MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 83. Italy MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 84. Russia MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 85. Middle East & Africa MLCC-grade Barium Titanate Powder Sales Market Share by Country (2021-2026)

Figure 86. Middle East & Africa MLCC-grade Barium Titanate Powder Sales Market Share by Synthesis Route (2021-2026)

Figure 87. Middle East & Africa MLCC-grade Barium Titanate Powder Sales Market Share by Application (2021-2026)

Figure 88. Egypt MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 89. South Africa MLCC-grade Barium Titanate Powder Revenue Growth

2021-2026 (\$ millions)

Figure 90. Israel MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 91. Turkey MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 92. GCC Countries MLCC-grade Barium Titanate Powder Revenue Growth 2021-2026 (\$ millions)

Figure 93. Manufacturing Cost Structure Analysis of MLCC-grade Barium Titanate Powder in 2026

Figure 94. Manufacturing Process Analysis of MLCC-grade Barium Titanate Powder

Figure 95. Industry Chain Structure of MLCC-grade Barium Titanate Powder

Figure 96. Channels of Distribution

Figure 97. Global MLCC-grade Barium Titanate Powder Sales Market Forecast by Region (2027-2032)

Figure 98. Global MLCC-grade Barium Titanate Powder Revenue Market Share Forecast by Region (2027-2032)

Figure 99. Global MLCC-grade Barium Titanate Powder Sales Market Share Forecast by Synthesis Route (2027-2032)

Figure 100. Global MLCC-grade Barium Titanate Powder Revenue Market Share Forecast by Synthesis Route (2027-2032)

Figure 101. Global MLCC-grade Barium Titanate Powder Sales Market Share Forecast by Application (2027-2032)

Figure 102. Global MLCC-grade Barium Titanate Powder Revenue Market Share Forecast by Application (2027-2032)

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