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# Global Chemical Dry Etching Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Chemical Dry Etching Equipment market size is expected to reach $ 2537 million by 2032, rising at a market growth of 7.7% CAGR during the forecast period (2026-2032).

In 2025, global sales of chemical dry etching equipment reached 248 units, with an average price of $5.956 million per unit.

Chemical Dry Etching Equipment refers to semiconductor and microfabrication process equipment that removes target materials through controlled gas-phase chemical reactions, reactive radicals, thermal chemistry, remote plasma chemistry, or other predominantly chemical dry processes. The equipment is designed to achieve isotropic or highly selective material removal while limiting ion-induced damage and maintaining tight control of etch rate, within-wafer uniformity, surface roughness, residue, and critical dimensions. Typical processed materials include silicon, silicon oxide, silicon nitride, silicon germanium, compound semiconductor materials, and selected metal or dielectric films. Commercial systems range from single-wafer and batch tools to multi-chamber cluster platforms, covering wafer sizes from research substrates to 300 mm production wafers. Chemical Dry Etching Equipment is increasingly used where conventional directional plasma etching or wet chemical processes cannot provide the required selectivity, conformality, access to recessed structures, or low-damage surface treatment. Key applications span advanced logic and foundry devices, DRAM and NAND memory, MEMS and sensors, power and compound semiconductors, advanced packaging, optoelectronics, and semiconductor process development. Representative process approaches include remote-plasma radical etching, gas chemical etching, thermal selective etching, vapor-phase HF or XeF2 etching, and hybrid radical/thermal processes. Tokyo Electron’s Certas platform and Shibaura Mechatronics’ CDE series

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demonstrate the industry use of gas chemical and remote-plasma radical processes for highly selective and isotropic dry etching.

## Industry Chain Analysis

The upstream industry for Chemical Dry Etching Equipment consists of precision vacuum and gas-handling components, remote-plasma or radical-generation sources, RF and microwave power modules where applicable, mass-flow controllers, valves, vacuum pumps, electrostatic chucks, temperature-control modules, process chambers, high-purity gas-delivery systems, endpoint and plasma-monitoring components, automation hardware and corrosion-resistant materials. Process gases and specialty chemicals are equally important because equipment performance is inseparable from the chemistry used to generate reactive species. In high-selectivity applications, chamber materials, contamination control, temperature stability and gas-distribution uniformity can materially affect process repeatability. These characteristics create relatively high supplier qualification requirements and make certain precision subsystems strategically important to equipment manufacturers.

The midstream value-creation layer is centered on system architecture, process-chamber design, proprietary chemistry, radical or plasma control, wafer temperature management, recipe development, process integration and customer application support. The highest value is generally generated by the combination of hardware and process know-how rather than by mechanical assembly alone. Production customers evaluate not only etch rate but also selectivity, within-wafer and wafer-to-wafer uniformity, defect levels, surface damage, chamber matching, uptime, throughput and cost of ownership. Downstream customers are semiconductor foundries, logic and memory IDMs, MEMS and sensor manufacturers, power and compound semiconductor companies, advanced-packaging facilities, optoelectronic manufacturers, research institutes and pilot lines. As Chemical Dry Etching Equipment becomes embedded in critical integration steps, recurring revenue opportunities can also arise from chamber parts, service, upgrades, process optimization and installed-base support.

## Regional Insights

Asia represents the principal demand center for Chemical Dry Etching Equipment because the region contains the largest concentration of advanced logic, foundry, memory and specialty-semiconductor manufacturing capacity. China, Taiwan, Korea

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and Japan collectively form the core equipment-demand base, although their market characteristics differ. Taiwan is strongly linked to leading-edge foundry and advanced packaging investment, Korea to advanced memory and HBM-related capacity, Japan to both semiconductor manufacturing and a strong domestic equipment ecosystem, and China to broad-based fab expansion and increasing localization of semiconductor manufacturing equipment. As an indicator of the broader capital-equipment environment, SEMI reported that China, Taiwan and Korea together represented approximately 79% of global semiconductor equipment spending in 2025, highlighting the exceptional concentration of semiconductor capital expenditure in Asia.

North America remains strategically important because of leading logic, memory, equipment and technology-development activity, while new fab investment supports opportunities for advanced process equipment. Europe has a smaller manufacturing base but retains important positions in specialty semiconductors, power devices, MEMS, automotive electronics and semiconductor R&D. Regional opportunity is therefore determined less by total wafer capacity alone than by the mix of device technologies being installed. Markets with leading-edge logic, advanced memory and sophisticated MEMS fabrication generally have higher Chemical Dry Etching Equipment intensity because these applications place greater value on selective, low-damage and isotropic processing. Over the medium term, geographic diversification of semiconductor manufacturing may broaden the equipment customer base, but Asia is expected to remain the center of demand given its existing manufacturing infrastructure and supplier ecosystem.

## Report Scope

This report studies the global Chemical Dry Etching Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Chemical Dry Etching Equipment 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 Chemical Dry Etching Equipment that contribute to its increasing demand across many markets.

## Highlights and key features of the study

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Global Chemical Dry Etching Equipment total production and demand, 2021-2032, (Units)

Global Chemical Dry Etching Equipment total production value, 2021-2032, (USD Million)

Global Chemical Dry Etching Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Chemical Dry Etching Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Chemical Dry Etching Equipment domestic production, consumption, key domestic manufacturers and share

Global Chemical Dry Etching Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Chemical Dry Etching Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Chemical Dry Etching Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Chemical Dry Etching Equipment 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 Tokyo Electron, Shibaura Mechatronics, Lam Research, Applied Materials, Hitachi High-Tech, KLA, SAMCO, Oxford Instruments, AMEC, PSR Semiconductor, 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 Chemical Dry Etching Equipment market

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## Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) 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 Chemical Dry Etching Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Chemical Dry Etching Equipment Market, Segmentation by Type:

Remote Plasma Chemical Dry Etching Equipment

Direct Plasma Chemical Dry Etching Equipment

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Thermal Chemical Dry Etching Equipment

Vapor-Phase Chemical Etching Equipment

Hybrid Radical/Thermal Chemical Etching Equipment

## Global Chemical Dry Etching Equipment Market, Segmentation by Etched Material:

Silicon

Silicon Oxide

Silicon Nitride

Silicon Germanium

Compound Semiconductor

Other

## Global Chemical Dry Etching Equipment Market, Segmentation by Wafer Size:

Up to 150 mm

200 mm

300 mm

Other

## Global Chemical Dry Etching Equipment Market, Segmentation by Application:

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Logic and Foundry ICs

Memory Devices

MEMS and Sensors

Power Semiconductors

RF and Compound Semiconductor Devices

Advanced Packaging

MicroLED and Optoelectronics

Others

## Companies Profiled:

Tokyo Electron

Shibaura Mechatronics

Lam Research

Applied Materials

Hitachi High-Tech

KLA

SAMCO

Oxford Instruments

AMEC

PSR Semiconductor

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Penta Nano Technology(Suzhou)

## Key Questions Answered

1. How big is the global Chemical Dry Etching Equipment market?
2. What is the demand of the global Chemical Dry Etching Equipment market?
3. What is the year over year growth of the global Chemical Dry Etching Equipment market?
4. What is the total value of the global Chemical Dry Etching Equipment market?
5. Who are the Major Players in the global Chemical Dry Etching Equipment market?
6. What are the growth factors driving the market demand?

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