

Global Components for Semiconductor Thermal Processing Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Components for Semiconductor Thermal Processing Equipment market size is expected to reach \$ 2895 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Components/parts for semiconductor thermal processing equipment refer to process-critical engineered parts used in semiconductor wafer fabrication tools for wafer support, process-chamber construction, gas delivery, heating and thermal uniformity, temperature sensing and control, sealing, insulation, and contamination protection. These components are mainly used in diffusion, oxidation, annealing, LPCVD, RTP/RTA, epitaxy, and MOCVD processes. Typical products include quartz process tubes, wafer boats, wafer carriers, injectors, baffles, liners, SiC-coated graphite susceptors, CVD-SiC parts, AlN and alumina ceramic heaters, ceramic support components, thermocouples, pyrometers, infrared temperature sensors, FFKM seals, and high-temperature insulation parts. The core requirements are high purity, low metallic contamination, particle control, dimensional stability at elevated temperatures, thermal-expansion compatibility, thermal uniformity, corrosion resistance, and stable service life, as these components directly affect wafer thermal budget, film uniformity, dopant activation, defect control, and tool uptime.

Components for semiconductor thermal processing equipment represent a multi-material and multi-component supply chain rather than a single product category. Under a narrow and professional scope, the core product families include quartz process tubes, wafer boats, carriers, injectors, SiC-coated graphite susceptors, CVD-SiC parts, ceramic heaters, thermocouples, pyrometers, infrared temperature sensors, high-temperature seals, and insulation parts. The market is driven not only by new thermal

processing tool installations, but also by installed-base replacement demand, periodic consumable change-out, tool refurbishment, and process-specific customization. The technical entry barriers are high because semiconductor thermal components must meet stringent requirements for purity, particle control, dimensional stability, thermal uniformity, corrosion resistance, and long-term repeatability.

From a supply-chain perspective, the global market is segmented by material platform and process function. Quartzware suppliers are distributed across Japan, the United States, South Korea, Europe, and China, while SiC-coated graphite and ultra-pure graphite components are more concentrated among specialized materials groups in Japan, Europe, and North America. Ceramic heaters and advanced ceramic components remain a higher-barrier segment, with Japanese and US suppliers maintaining strong positions and selected Chinese suppliers moving into volume production. Temperature measurement and sealing components form adjacent but important sub-segments, where specialized suppliers compete based on application know-how and long-term reliability rather than broad product catalogs.

Demand growth through the next few years is expected to be supported by 300mm fab expansion, mature-node localization, power semiconductor capacity additions, and compound semiconductor epitaxy. The rise of SiC and GaN manufacturing increases the demand for SiC-coated graphite, high-purity graphite, and high-temperature ceramic components, while continued investment in memory, logic, and specialty fabs supports quartzware and ceramic heater demand for diffusion, oxidation, LPCVD, and annealing tools. Public equipment-market data from SEMI indicates that global semiconductor manufacturing equipment investment remains structurally high, providing an upper-level demand foundation for the component market.

The competitive landscape is expected to evolve toward higher specialization, tighter OEM qualification, and stronger regional supply-chain localization. Leading suppliers will continue to benefit from long qualification cycles, global service coverage, and deep materials know-how. At the same time, Chinese suppliers are likely to gain share in quartzware, selected ceramic components, and replacement parts as domestic fabs and equipment OEMs localize procurement. However, high-end SiC-coated graphite, advanced ceramic heaters, and ultra-high-purity engineered components will still require sustained investment in materials, precision machining, cleaning, metrology, coating, and batch consistency before broader substitution can occur.

This report studies the global Components for Semiconductor Thermal Processing Equipment demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Components for Semiconductor Thermal Processing 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 Components for Semiconductor Thermal Processing Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Components for Semiconductor Thermal Processing Equipment total market, 2021-2032, (USD Million)

Global Components for Semiconductor Thermal Processing Equipment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Components for Semiconductor Thermal Processing Equipment total market, key domestic companies, and share, (USD Million)

Global Components for Semiconductor Thermal Processing Equipment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Components for Semiconductor Thermal Processing Equipment total market by Material Platform, CAGR, 2021-2032, (USD Million)

Global Components for Semiconductor Thermal Processing Equipment total market by Equipment Type, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Components for Semiconductor Thermal Processing Equipment market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Ferrotec Holdings Corporation, CoorsTek, Inc., WONIK QnC Corporation, Schunk Xycarb Technology, Tosoh Quartz, SGL Carbon SE, Toyo Tanso, Mersen S.A., Momenite Technologies, Kyocera Corporation, 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 Components for Semiconductor Thermal Processing Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Material Platform, and by Equipment Type. 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 Components for Semiconductor Thermal Processing Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Components for Semiconductor Thermal Processing Equipment Market, Segmentation by Material Platform:

Fused Quartz / High-Purity Quartz

SiC & SiC-Coated Graphite

Advanced Ceramics

Ultra-Pure Graphite / Carbon

High-Performance Polymers & Elastomers

Metals & Alloy Assemblies

Other Materials

Global Components for Semiconductor Thermal Processing Equipment Market, Segmentation by Product Function:

Wafer Support & Handling Components

Process Chamber & Reactor Quartzware

Heating & Thermal-Uniformity Components

Temperature Sensing & Control Components

Sealing, Insulation & Ancillary Components

Other Process-Critical Components

Global Components for Semiconductor Thermal Processing Equipment Market, Segmentation by Process Application:

Oxidation & Diffusion

Annealing & Dopant Activation

LPCVD Film Deposition

Epitaxy & Compound Semiconductor Growth

Thermal Cleaning / Pre-treatment Adjacent

Other Thermal Applications

Global Components for Semiconductor Thermal Processing Equipment Market, Segmentation by Equipment Type:

Batch Diffusion / Oxidation Furnaces

LPCVD / Low-Pressure Furnace Systems

RTP / RTA / Spike Anneal Tools

Epitaxy / MOCVD Reactors

Laser Anneal / Advanced Single-Wafer Thermal Tools

Other Thermal Processing Tools

Companies Profiled:

Ferrotec Holdings Corporation

CoorsTek, Inc.

WONIK QnC Corporation

Schunk Xycarb Technology

Tosoh Quartz

SGL Carbon SE

Toyo Tanso

Mersen S.A.

Momentive Technologies

Kyocera Corporation

NGK Insulators

MARUWA

Watlow

Advanced Energy

Greene Tweed

Parker Hannifin

Morgan Advanced Materials

Raesch Quarz

Technical Glass Products

Uniglass

AGC Ceramics

Fralock

Techno Quartz Inc.

Hubei Feilihua

Suzhou Kema

Beijing Kaide Quartz

Shanghai Qianghua

Ningbo Yunde

Key Questions Answered

1. How big is the global Components for Semiconductor Thermal Processing Equipment market?
2. What is the demand of the global Components for Semiconductor Thermal Processing Equipment market?
3. What is the year over year growth of the global Components for Semiconductor

Thermal Processing Equipment market?

4. What is the total value of the global Components for Semiconductor Thermal Processing Equipment market?

5. Who are the Major Players in the global Components for Semiconductor Thermal Processing Equipment market?

6. What are the growth factors driving the market demand?

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