

Global Critical Parts and Consumables for Semiconductor Etching Equipment Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Critical Parts and Consumables for Semiconductor Etching Equipment market size was valued at US\$ 5506 million in 2025 and is forecast to a readjusted size of US\$ 10068 million by 2032 with a CAGR of 8.7% during review period.

Critical Parts and Consumables for Semiconductor Etching Equipment refer to high-purity, precision-engineered process chamber components and periodically replaced consumable parts used in dry etching, plasma etching, reactive ion etching, ICP/CCP etching, atomic layer etching, and related plasma-based semiconductor manufacturing tools. These parts are typically made from high-purity silicon, single-crystal silicon, fused quartz, alumina, aluminum nitride, yttria, silicon carbide, CVD-SiC, coated ceramics, and selected ultra-clean metallic materials, and are manufactured through crystal growth, powder processing, ceramic sintering, CVD deposition, precision machining, micro-hole drilling, grinding, polishing, surface coating, chemical cleaning, clean packaging, and customer qualification. Major product forms include silicon electrodes, silicon rings, silicon showerheads, focus rings, edge rings, confinement rings, shield rings, quartz rings, quartz windows, quartz liners, SiC/CVD-SiC rings, ceramic rings, ceramic nozzles, ceramic insulators, yttria-coated parts, alumina-coated parts, electrostatic chucks, ceramic heaters, chamber liners, and other process-contact components. Their core functions are to support plasma uniformity, wafer edge control, gas distribution, wafer holding, chamber protection, thermal stability, low metallic contamination, low particle generation, and high tool uptime under aggressive plasma, corrosive gas, vacuum, and RF-power conditions.

Critical parts and consumables for semiconductor etching equipment represent one of the most process-sensitive and recurring-demand segments within front-end equipment components. Their value is not defined by generic machining capability, but by high-purity material control, plasma erosion resistance, micro-hole drilling, particle and metallic contamination control, thermal stability, edge etch uniformity, and long qualification cycles with equipment OEMs and wafer fabs. Silicon electrodes, silicon rings, SiC focus rings, ceramic rings, quartz windows, chamber liners, coated components, and electrostatic chucks operate directly or indirectly inside aggressive plasma environments and directly affect process stability and tool uptime. In this market, silicon electrodes and rings remain core consumables for dry etching, while SiC/CVD-SiC and advanced ceramics are gaining share in higher-end chambers where lifetime, erosion resistance, and low-particle performance are more critical. Once a supplier is qualified by a leading tool OEM or fab, the business tends to have high stickiness, but the entry barrier is also materially higher than for standard mechanical parts.

From the supply side, the global industry is structured around U.S. strengths in silicon components, ceramics, coatings, and fab services; Japanese and Korean strengths in silicon, SiC, ceramics, electrostatic chucks, and memory-related supply chains; Chinese suppliers that are rapidly expanding from silicon, quartz, ceramics, and precision metal parts; and European suppliers with coating materials, ceramics, and high-performance materials expertise. Silfex, CoorsTek, Mitsubishi Materials, Hana Materials, Tokai Carbon/TCK, SK Enpulse, Kyocera, NGK/NTK, Worldex, and Entegris form the key global supplier group. Korean suppliers benefit from close linkage with domestic memory fabs, Japanese companies retain deep material know-how and long-standing customer qualification records, and U.S. suppliers have strong positions in high-purity silicon, ceramic components, and coatings. In China, Thinkon Semiconductor, Kema Material, Ningbo Yunde, Feilihua, Pacific Quartz, Shenyang Fortune Precision, and Sinopack represent different entry routes, but their competitiveness varies substantially by product type, 300mm qualification status, advanced-node readiness, and access to international tool OEMs.

Demand is driven by both new tool installations and recurring replacement of consumables in the installed base. Advanced logic, GAA structures, backside power delivery, advanced DRAM, HBM-related manufacturing, higher-layer 3D NAND, and high-aspect-ratio etching all increase the number of plasma etch steps and raise the value of chamber parts. SEMI's forecast for strong growth in global 300mm fab equipment spending in 2026 and 2027 provides an important demand signal for etch tools and their associated process-critical consumables. However, this market should

not be modeled purely by wafer area or tool count, because the replacement cycle and value per chamber vary by etch chemistry, RF configuration, chamber design, process node, material route, and fab maintenance strategy. Focus rings, silicon electrodes, ceramic liners, ESCs, and coated chamber parts all have different lifetimes and qualification requirements.

From a technology route perspective, the market is evolving from traditional silicon and quartz components toward a multi-material structure that includes silicon, SiC, CVD-SiC, high-purity alumina, aluminum nitride, yttria coatings, and composite ceramic solutions. Silicon parts remain essential for electrodes, gas distribution, and confinement rings, while SiC focus rings and CVD-SiC components are increasingly adopted in more aggressive plasma environments. Advanced ceramics and coatings are also expanding as fabs pursue lower particle counts, improved chamber protection, and longer maintenance intervals. Future competition will shift from single-material machining to integrated material-platform capability. Suppliers with high-purity material access, precision machining, coating, cleaning, metrology, refurbishment, and co-development capability with tool OEMs will be best positioned. Chinese suppliers may first expand in mature-node and domestic-tool supply chains, but higher-end penetration will depend on advanced qualification and stable performance in leading memory and logic fabs.

This report is a detailed and comprehensive analysis for global Critical Parts and Consumables for Semiconductor Etching Equipment market. Both quantitative and qualitative analyses are presented by company, by region & country, By Material System 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 Critical Parts and Consumables for Semiconductor Etching Equipment market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Critical Parts and Consumables for Semiconductor Etching Equipment market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Critical Parts and Consumables for Semiconductor Etching Equipment market

size and forecasts, By Material System and By Application, in consumption value (\$ Million), 2021-2032

Global Critical Parts and Consumables for Semiconductor Etching Equipment market shares of main players, in revenue (\$ Million), 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 Critical Parts and Consumables for Semiconductor Etching Equipment

- 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 Critical Parts and Consumables for Semiconductor Etching 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 Silfex Inc., Hana Materials Inc., Worldex Industry & Trading Co., Ltd., Mitsubishi Materials, CoorsTek, NGK Insulators, Kyocera, Ferrotec, TOTO Advanced Ceramics, Niterra Co., Ltd., etc.

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

Market segmentation

Critical Parts and Consumables for Semiconductor Etching Equipment market is split By Material System and By Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value By Material System and By Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment By Material System

Silicon Partstching

SiC Parts

Ceramic Parts

Quartz Parts

Coated Parts

Other Materials

Market segment By Product Form

Electrodes and Gas Distribution Plates

Rings

Electrostatic Chucks and Ceramic Heaters

Chamber Liners and Shields

Windows, Nozzles and Insulators

Coated / Refurbished Components

Other Customized Parts

Market segment By Customer Type

Etch Equipment OEMs

Wafer Fabs/IDMs/Foundries

Cleaning and Refurbishment Service Providers

Market segment By Application

Dielectric Etch

Silicon Etch

Metal Etch

High Aspect Ratio Etch

Atomic Layer Etch

Cryogenic Etch

Other Etch Processes

Market segment by players, this report covers

Silfex Inc.

Hana Materials Inc.

Worldex Industry & Trading Co., Ltd.

Mitsubishi Materials

CoorsTek

NGK Insulators

Kyocera

Ferrotec

TOTO Advanced Ceramics

Niterra Co., Ltd.

ASUZAC Fine Ceramics

Japan Fine Ceramics Co., Ltd. (JFC)

Maruwa

SiFusion

KC Parts Tech., Ltd.

RS Technologies Co., Ltd.

ThinkonSemi (Fujian Dynafine)

Techno Quartz Inc.

CMTX Co.,Ltd

Morgan Advanced Materials

CeramTec

Saint-Gobain

Schunk Xycarb Technology

MiCo Ceramics Co., Ltd.

WONIK QnC

Micro Ceramics Ltd

Suzhou KemaTek, Inc.

Tosoh Quartz Corporation

Heraeus Covantics

Shin-Etsu Quartz Products

SUMCO (JSQ)

Momentive Technologies

TKG Solmics

AGC

Tokai Carbon

Mersen

SGL Carbon

Toyo Tanso

Hunan Dezhi New Materials

Shenzhen Zhicheng Semiconductor Materials

Chengdu Ultra Pure Applied Materials

Chongqing Genori Technology Co., Ltd

Shanghai Companion

Sanzer (Shanghai) New Materials Technology

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Critical Parts and Consumables for Semiconductor Etching Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Critical Parts and Consumables for Semiconductor Etching Equipment, with revenue, gross margin, and global market share of Critical Parts and Consumables for Semiconductor Etching Equipment from 2021 to 2026.

Chapter 3, the Critical Parts and Consumables for Semiconductor Etching Equipment competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size By Material System and By Application, with consumption value and growth rate By Material System, By Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Critical Parts and Consumables for Semiconductor Etching Equipment market forecast, by regions, By Material System and By Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Critical Parts and Consumables for Semiconductor Etching Equipment.

Chapter 13, to describe Critical Parts and Consumables for Semiconductor Etching Equipment research findings and conclusion.

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