

Global Critical Parts and Consumables for Semiconductor Etching Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Critical Parts and Consumables for Semiconductor Etching Equipment market size is expected to reach \$ 10068 million by 2032, rising at a market growth of 8.7% CAGR during the forecast period (2026-2032).

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 studies the global Critical Parts and Consumables for Semiconductor Etching Equipment demand, key companies, and key regions.

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

Highlights and key features of the study

Global Critical Parts and Consumables for Semiconductor Etching Equipment total market, 2021-2032, (USD Million)

Global Critical Parts and Consumables for Semiconductor Etching Equipment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Critical Parts and Consumables for Semiconductor Etching Equipment total market, key domestic companies, and share, (USD Million)

Global Critical Parts and Consumables for Semiconductor Etching Equipment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Critical Parts and Consumables for Semiconductor Etching Equipment total market By Material System, CAGR, 2021-2032, (USD Million)

Global Critical Parts and Consumables for Semiconductor Etching Equipment total market By Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Critical Parts and Consumables for Semiconductor Etching Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, By Material System, 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 Critical Parts and Consumables for Semiconductor Etching Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Critical Parts and Consumables for Semiconductor Etching Equipment Market,
Segmentation By Material System:

Silicon Partstching

SiC Parts

Ceramic Parts

Quartz Parts

Coated Parts

Other Materials

Global Critical Parts and Consumables for Semiconductor Etching Equipment Market,
Segmentation 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

Global Critical Parts and Consumables for Semiconductor Etching Equipment Market, Segmentation By Customer Type:

Etch Equipment OEMs

Wafer Fabs/IDMs/Foundries

Cleaning and Refurbishment Service Providers

Global Critical Parts and Consumables for Semiconductor Etching Equipment Market, Segmentation By Application:

Dielectric Etch

Silicon Etch

Metal Etch

High Aspect Ratio Etch

Atomic Layer Etch

Cryogenic Etch

Other Etch Processes

Companies Profiled:

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

Key Questions Answered

1. How big is the global Critical Parts and Consumables for Semiconductor Etching Equipment market?
2. What is the demand of the global Critical Parts and Consumables for Semiconductor Etching Equipment market?
3. What is the year over year growth of the global Critical Parts and Consumables for Semiconductor Etching Equipment market?
4. What is the total value of the global Critical Parts and Consumables for Semiconductor Etching Equipment market?
5. Who are the Major Players in the global Critical Parts and Consumables for Semiconductor Etching Equipment market?
6. What are the growth factors driving the market demand?

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