

Global Non-metallic Parts for Semiconductor Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-metallic Parts for Semiconductor Equipment market size is expected to reach \$ 14998 million by 2032, rising at a market growth of 7.7% CAGR during the forecast period (2026-2032).

Non-metallic parts for semiconductor manufacturing equipment refer to process-critical parts, consumables and structural components made from high-purity silicon, quartz or fused silica, alumina, aluminum nitride, yttria, YAG, silicon nitride, zirconia, silicon carbide, graphite and carbon-based composite materials. These components are manufactured through crystal growth, quartz forming, CVD, CVD coating, ceramic sintering, hot pressing, precision machining, ultra-cleaning, surface treatment and clean packaging. They are used as process-chamber parts, wafer-supporting parts, thermal-field parts, insulating structures, wafer-handling components, gas distribution parts and consumables in semiconductor manufacturing equipment. Typical products include silicon electrodes, silicon rings, quartz tubes, quartz boats, quartz chambers, ceramic chucks, ceramic arms, ceramic showerheads, SiC rings, CVD-SiC components, SiC-coated graphite susceptors, graphite thermal-field components and ceramic end effectors. Their main value lies in improving chamber cleanliness, corrosion resistance, plasma erosion resistance, thermal stability, dimensional precision, particle control and process repeatability in semiconductor production tools.

Non-metallic components for semiconductor manufacturing equipment cover silicon parts, quartz components, advanced ceramic parts, silicon carbide components and graphite or carbon-based thermal-field parts. They are widely used as process-chamber parts, wafer-supporting structures, gas distribution components, thermal-field parts, electrical insulators, wafer-handling components and consumables in wafer fabrication

and selected advanced packaging equipment. Their value is increasingly linked to equipment uptime, chamber matching, particle performance, process stability, yield and cost of ownership. As semiconductor processes move toward higher aspect ratios, more complex materials and more stringent contamination control, non-metallic components are shifting from standard consumables to process-enabling parts. Official product information from CoorsTek, Kyocera and CeramTec shows that semiconductor-grade ceramics are used across wafer processing, etch, deposition, wafer handling, inspection and high-precision equipment structures.

By product route, silicon parts are concentrated in dry etch tools, including silicon electrodes, rings, focus rings and customized chamber parts. Quartz parts are used in diffusion, oxidation, annealing, cleaning, epitaxy and high-temperature process equipment, including tubes, boats, bell jars, tanks, carriers and chambers. Advanced ceramic parts cover alumina, aluminum nitride, yttria, YAG, silicon nitride, zirconia and SiSiC components used in ceramic chucks, end effectors, arms, insulators, liners, showerheads and precision structural parts. SiC parts include CVD-SiC, solid SiC and SiC-coated graphite components for etch, epitaxy, MOCVD, RTP and high-temperature deposition. Graphite and carbon-based parts are used mainly in epitaxy, ion implantation and high-temperature thermal-field applications. The product scope is therefore best understood as a multi-material component platform rather than a single-material market. Schunk Xycarb states that it supplies SiC-coated graphite, quartz, ceramic and silicon consumable products for microelectronics, while Ferrotec lists CVD-SiC, quartz, ceramics and silicon parts in its equipment-related business.

Regionally, Japan, the United States, Europe and Korea remain the core high-end supply bases. Japanese suppliers have deep capabilities in quartzware, CVD-SiC, SiC-coated graphite, fine ceramics and high-temperature materials. U.S. suppliers are strong in custom silicon components, high-purity quartz, advanced ceramics and high-purity SiC material systems. European suppliers maintain strong positions in engineered ceramics, fused silica, graphite, carbon materials and high-temperature structures. Korean suppliers benefit from proximity to memory customers and have built a strong cluster around silicon electrodes and rings, quartz ware, Al₂O₃ and SiC parts for etch and deposition tools. China is entering a faster qualification and localization phase, with opportunities in domestic equipment platforms, mature-node replacement parts, second-source qualification by fabs, quartzware, ceramic components, SiC-coated parts and selected standardized etch consumables.

Demand is concentrated in etch, deposition, diffusion, annealing, RTP, epitaxy, MOCVD, wafer handling, inspection and selected packaging-related equipment. Etch is

one of the most value-dense applications because silicon electrodes, silicon rings, SiC rings, ceramic chamber parts, quartz components and plasma-resistant ceramics all scale with chamber count, process steps and replacement cycles. Diffusion, oxidation, annealing and high-temperature CVD drive demand for quartz tubes, boats, SiC boats, ceramic supports and thermal-field components. Epitaxy and MOCVD drive demand for SiC-coated graphite susceptors, trays, wafer carriers and high-purity graphite components. Wafer handling, inspection, metrology and lithography-related equipment require lightweight, stiff, low-thermal-expansion and high-precision ceramic structures. SEMI's 300mm fab equipment spending outlook points to continued equipment investment growth in 2026-2027, supporting demand for critical non-metallic process components.

Policy and supply-chain dynamics are also reinforcing the market. CHIPS for America, the European Chips Act and China's 14th Five-Year Plan all strengthen investment in semiconductor manufacturing, key equipment and critical materials. NIST states that the CHIPS and Science Act provided the U.S. Department of Commerce with USD 50 billion for semiconductor research, development and manufacturing programs. The European Commission states that the European Chips Act aims to reinforce the EU semiconductor ecosystem, ensure supply-chain resilience and reduce external dependencies. China's 14th Five-Year Plan also identifies IC design tools, key equipment and high-purity target materials as key development priorities. For non-metallic semiconductor equipment components, this policy environment supports regionalization, multi-sourcing, local qualification and capacity expansion. Future competition will increasingly depend on material purity, complex-shape precision machining, batch consistency, particle control, OEM qualification, fab validation and scalable delivery capability.

This report studies the global Non-metallic Parts for Semiconductor Equipment demand, key companies, and key regions.

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

Highlights and key features of the study

Global Non-metallic Parts for Semiconductor Equipment total market, 2021-2032, (USD

Million)

Global Non-metallic Parts for Semiconductor Equipment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Non-metallic Parts for Semiconductor Equipment total market, key domestic companies, and share, (USD Million)

Global Non-metallic Parts for Semiconductor Equipment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Non-metallic Parts for Semiconductor Equipment total market By Material Family, CAGR, 2021-2032, (USD Million)

Global Non-metallic Parts for Semiconductor Equipment total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Non-metallic Parts for Semiconductor 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 Non-metallic Parts for Semiconductor Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, By Material Family, 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 Non-metallic Parts for Semiconductor Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-metallic Parts for Semiconductor Equipment Market, Segmentation By Material Family:

Silicon Parts

Quartz/Fused Silica Parts

Advanced Ceramic Parts

Silicon Carbide Parts

Graphite/Carbon-based Parts

Other Non-metallic Parts

Global Non-metallic Parts for Semiconductor Equipment Market, Segmentation By Component Form:

Rings/Electrodes

Tubes/Boats/Carriers

Chucks/Arms/End Effectors

Showerheads/Gas Distribution Parts

Liners/Plates/Shields

Susceptors/Thermal-field Parts

Other Custom Parts

Global Non-metallic Parts for Semiconductor Equipment Market, Segmentation By Process Contact Level:

Direct Plasma-facing Components

Direct Wafer-contact Components

High-temperature Process Components

Chemical / Wet Process Components

Structural / Insulating Components

Other Contact Levels

Global Non-metallic Parts for Semiconductor Equipment Market, Segmentation by Application:

Etch Equipment

Deposition Equipment

Diffusion/Furnace/Annealing Equipment

Epitaxy/MOCVD Equipment

Lithography/Metrology/Inspection Equipment

Wafer Handling/Transfer Equipment

Packaging/Backend Equipment

Other Equipment

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 Non-metallic Parts for Semiconductor Equipment market?
2. What is the demand of the global Non-metallic Parts for Semiconductor Equipment market?
3. What is the year over year growth of the global Non-metallic Parts for Semiconductor Equipment market?
4. What is the total value of the global Non-metallic Parts for Semiconductor Equipment market?
5. Who are the Major Players in the global Non-metallic Parts for Semiconductor Equipment market?
6. What are the growth factors driving the market demand?

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