

# Global Plastic Parts for Semiconductor 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 Plastic Parts for Semiconductor Equipment market size was valued at US\$ 3789 million in 2025 and is forecast to a readjusted size of US\$ 6276 million by 2032 with a CAGR of 7.7% during review period.

Plastic Parts for Semiconductor Equipment refers to polymer-based components and subassemblies used in semiconductor equipment and wafer-fab utility systems where corrosion resistance, ultra-cleanliness, low extractables/low particles, dimensional stability, ESD control, and (in some modules) low outgassing are required. In industry practice, this category is dominated by fluoropolymers for wet/chemical service—PFA parts, PTFE parts, PVDF parts—and high-performance engineering plastics for high-wear/high-temperature/precision/vacuum service—PEEK parts, PPS parts, PI (polyimide/PAI) parts—supplemented by General Engineering Plastics (GEPs) for non-wetted covers, frames, and general mechanical fixtures. The “semiconductor-grade” boundary is typically defined by performance and qualification requirements for polymer materials/components used in ultrapure water and chemical distribution from bulk supply through facility distribution to process equipment; SEMI’s polymer specification for UPW and liquid chemical distribution explicitly includes purity, mechanical requirements, and packaging/traceability requirements, which is the prevailing qualification logic for many UHP polymer parts used around fab chemical delivery.

Across the applications, polymer selection maps to the dominant stressors: Cleaning & Wet Process Tools and Wafer Fab Facilities consume the highest volumes of fluoropolymer plastics in wetted paths (tanks, piping, fittings, valves, manifolds, filter housings) because wet benches and tanks are commonly specified in

PP/PVDF/PFA/PTFE/ECTFE families depending on chemical set and temperature window. CMP Equipment is one of the most plastics-intensive tool categories due to abrasive slurry + reactive chemistries; the critical consumable is the retainer/retaining ring, where typical materials include PEEK and PPS (and, in some ecosystems, PET), selected for abrasion and chemical resistance. Plating & Electrochemical Tools, Etch, and parts of Deposition (CVD/PVD/ALD/Epi) also pull UHP fluoropolymers in chemical delivery and chamber-adjacent fixtures, while PI/PAI and related high-temperature/vacuum-capable plastics are common in dry/vacuum zones where ultra-low outgassing is needed. Lithography Track/Coater & Developer, Metrology & Inspection, and Wafer Handling/EFEM/FOUP & Carriers rely heavily on polymer-based handling interfaces (FOUPs/carriers, end-effectors/contact parts, ESD-managed plastics) and UHP chemical connections (e.g., PFA fittings engineered for leak-free, low dead-volume ultrapure fluid service).

The North American market for Plastic Parts for Semiconductor Equipment was valued at US\$ 1,004 million in 2025 and is projected to reach US\$ 1,666 million by 2032, at a CAGR of 7.78% from 2026 to 2032.

The European market for Plastic Parts for Semiconductor Equipment was valued at \$ 528 million in 2025 and is projected to total US\$ 776 million by 2032, at a CAGR of 6.0% from 2026 to 2032.

The China market for Plastic Parts for Semiconductor Equipment was valued at \$ 613 million in 2025 and is projected to total US\$ 1271 million by 2032, at a CAGR of 10.98% from 2026 to 2032.

The Japan market for Plastic Parts for Semiconductor Equipment was valued at \$ 666.68 million in 2025 and is projected to total US\$ 995 million by 2032, at a CAGR of 6.24% from 2026 to 2032.

The South Korea market for Plastic Parts for Semiconductor Equipment was valued at \$ 361 million in 2025 and is projected to total US\$ 584 million by 2032, at a CAGR of 7.29% from 2026 to 2032.

The global key companies in the Plastic Parts for Semiconductor Equipment market include Entegris, Pall Corporation, Shin-Etsu Polymer, PILLAR Corporation, Parker Hannifin, Gudeng Precision, Nichias Corporation, Daikin, Willbe S&T, GEM? Group, SMC, Miraial Co.,Ltd, R?chling Industrial, SIMONA AG and Saint-Gobain, etc. In 2025, the ten largest players accounted for approximately 59.85% of revenue.

Plastic Parts for Semiconductor Equipment is currently in a structural upcycle driven by both (i) sustained fab investment and (ii) rising wet-process/material intensity per wafer. SEMI projects front-end fab equipment spending to reach \$110B in 2025 (sixth consecutive year of growth since 2020), while total semiconductor manufacturing equipment sales are projected to rise further toward a record \$156B by 2027—expanding the global installed base that continuously consumes polymer components (UHP fluid paths, CMP polymers, wafer-handling plastics, facility plastics, etc.). In materials, SEMI's latest outlook shows wet chemicals continuing to expand (e.g., \$3.7B in 2025 and \$4.1B by 2026), mechanically pulling through more UHP polymer tubing/fittings/valves, filtration housings, tanks/liners, and tool-side chemical modules across “bulk ? facility distribution ? point-of-use.” The industry's current baseline requirement is shifting from “engineering plastics availability” to qualification-grade performance and documentation: standards like SEMI F57 codify minimum requirements for UHP polymer materials/components in UPW and liquid chemical distribution, and leading suppliers increasingly market copy-exact / tighter process controls (material purity, stress control, dimensional stability, cleaning/packaging, traceability) as a prerequisite to win tool OEM and fab approvals.

Looking forward, the dominant trends and demand drivers are: (1) higher purity + lower defect budgets, which accelerate adoption of semiconductor-grade fluoropolymers and more rigorous contamination controls; (2) more ESD-managed and safety-engineered polymer systems, especially for solvent and non-conductive chemical lines—e.g., conductive-path PFA tubing/fittings designed to dissipate charge buildup while maintaining chemical purity; (3) AI/HBM-led capex and technology complexity, which lifts utilization of CMP/wet modules and increases replacement cycles for wear/consumable plastics in carrier heads, wet benches, and facility chemical distribution (supported by SEMI's raised equipment outlook and strong back-end recovery); (4) supplier localization + standards alignment, where regions (notably Asia) push domestic qualification of UHP polymer components to reduce lead-time and geopolitical risk while converging on SEMI-like specs; and (5) PFAS/fluoropolymer regulatory scrutiny becoming a strategic constraint, forcing the industry to invest in emissions control, compliance documentation, and “essential use” arguments for fluoropolymer-dependent applications (the EEA briefing highlights PFAS polymer impact/knowledge gaps and links to ongoing EU policy proposals).

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

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

Global Plastic Parts for Semiconductor Equipment market size and forecasts, by Plastic Type and by Application, in consumption value (\$ Million), 2021-2032

Global Plastic Parts for Semiconductor 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 Plastic Parts for Semiconductor 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 Plastic 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 Entegris, Pall Corporation, Shin-Etsu Polymer, PILLAR Corporation, Parker Hannifin, KITZ SCT, White Knight (Graco), IWAKI, Ensinger Group, Nichias Corporation, etc.

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

### **Market segmentation**

Plastic Parts for Semiconductor Equipment market is split by Plastic Type and by Application. For the period 2021-2032, the growth among segments provides accurate

calculations and forecasts for Consumption Value by Plastic Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Plastic Type

PFA Parts

PEEK Parts

PTFE Parts

General Engineering Plastics (GEPs)

PPS Parts

PVDF Parts

PI (Polyimide/PAI) Parts

Others

#### Market segment by Product Type

Plastic Valves, Fitting and Tubing

CMP Retainer Ring

Wafer Carriers

Others

#### Market segment by End Use

Semiconductor Equipment (OEM)

Wafer Fab Facilities

## Market segment by Application

Cleaning & Wet Process Tools

CMP Equipment

Plating & Electrochemical Tools

Etch Equipment

Deposition Equipment (CVD/PVD/ALD/Epi)

Lithography Track/Coater & Developer

Metrology & Inspection Equipment

Wafer Handling/EFEM/FOUP & Carriers

Wafer Fab Facilities

Others

## Market segment by players, this report covers

Entegris

Pall Corporation

Shin-Etsu Polymer

PILLAR Corporation

Parker Hannifin

KITZ SCT

White Knight (Graco)

IWAKI

Ensinger Group

Nichias Corporation

Sun Fluoro System

Daikin

Yodogawa Hu-Tech

Yasojima Proceed

PBI Advanced Materials

Miraial Co.,Ltd

Dainichi Shoji K.K.

Mitsubishi Chemical

CKD Corporation

SMC

Junkosha Inc.

Asahi/America, Inc.

Fit-Line Global

C-Hawk Technology, Inc.

Pexco

DuPont

R?chling Industrial

Saint-Gobain

SIMONA AG

SAT Group

GEM? Group

Porvair Filtration Group

Willbe S&T

Cnus Co., Ltd.

Wooam Super Polymer

Chemiflon

ENIB Co., Ltd.

EPK, Co., Ltd

IST Co., Ltd.

3SLine Co.,Ltd

3S Korea

CALITECH

Chuang King Enterprise

Gudeng Precision

ESI Products Inc.

Shen-Yueh Technology

Niche Applied Materials Co., Ltd.

Duratek

AKT Components

UIS Technologies

Jiangsu OKFLON Precision Manufacturing

Xiamen Baoshili Dustless Technology

HPRAY (Changzhou) Clean System Technology

Changzhou Junhang High Performance Composite Materials

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 Plastic Parts for Semiconductor Equipment product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Plastic Parts for Semiconductor 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 Plastic Type and by Application, with

consumption value and growth rate by Plastic Type, 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 Plastic Parts for Semiconductor Equipment market forecast, by regions, by Plastic Type 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 Plastic Parts for Semiconductor Equipment.

Chapter 13, to describe Plastic Parts for Semiconductor Equipment research findings and conclusion.

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