

# Global Quartz 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 Quartz Parts for Semiconductor Equipment market size was valued at US\$ 684 million in 2025 and is forecast to a readjusted size of US\$ 1202 million by 2032 with a CAGR of 8.3% during review period.

Quartz Parts for Semiconductor Manufacturing Equipment refer to high-purity fused quartz, synthetic fused silica, or semiconductor-grade quartz glass components that are fabricated through flame working, cold working, CNC machining, welding, grinding, polishing, chemical cleaning, clean packaging, and customer qualification processes for use inside semiconductor wafer-fabrication equipment. The product scope mainly covers quartz process tubes, wafer boats, wafer carriers, rings, windows, bell jars, liners, chambers, gas injectors, nozzles, flanges, tanks, pedestals, and customized quartz components installed in process chambers, thermal-processing systems, wafer-handling modules, gas/liquid delivery areas, observation windows, and other process-contact zones. These components provide high purity, thermal resistance, low thermal expansion, chemical corrosion resistance, low metallic contamination, and stable process environments for diffusion, oxidation, LPCVD, CVD/PECVD, etching, epitaxy, RTP, wet cleaning, ion implantation, and wafer-handling steps.

Quartz parts for semiconductor manufacturing equipment represent a mature but structurally growing segment within high-purity non-metallic process-contact components. The value of this segment is not determined by quartz material cost alone, but by purity control, precision fabrication, thermal stability, chemical resistance, low metallic contamination, cleanroom processing, OEM qualification, and long-term field performance in wafer fabs. These parts are used as process tubes, wafer boats,

carriers, rings, windows, bell jars, liners, chambers, injectors, tanks, and customized components across diffusion, oxidation, LPCVD, CVD/PECVD, etching, epitaxy, RTP, wet cleaning, ion implantation, and wafer-handling processes. The installed base is mature, but the shift to 300mm capacity, higher 3D NAND layer counts, advanced logic, HBM-related memory investment, and regional fab localization is driving a higher mix of complex, high-purity, and customized quartz components.

From the supply side, the global industry is structured around leading material-and-fabrication groups in Europe, Japan, and the United States; Korea-based wafer-fab supply-chain specialists; fast-developing Chinese manufacturers; and a long tail of regional precision quartz fabricators. Heraeus, Shin-Etsu Quartz, Tosoh Quartz, Ferrotec, Momentive Technologies, MARUWA, Techno Quartz, and Schunk/SemiMat form the core international supplier group with established material know-how, fabrication capability, and customer qualification records. WONIK QnC has a particularly strong position in Korea, with quartz ware disclosed as a key business line. In China, Feilihua, Pacific Quartz, Kaide Quartz, Ningbo Yunde, Shenyang Hanntek, and Zhejiang Futong represent different stages of domestic supply-chain participation, ranging from listed materials platforms to emerging specialized component makers. The core formal list should therefore not be restricted to a small set of global leaders; the extended longlist remains important for tracking local qualification progress, new entrants, and regional sourcing alternatives.

Demand is anchored in thermal-processing quartz parts such as process tubes, boats, and wafer carriers, while higher-value growth is increasingly coming from etch, epitaxy, PECVD, wet-process, and customized chamber-related components. The recovery and expansion of 300mm fab investment provide the most direct macro driver for this market, because quartz parts are tied to both new equipment installation and recurring replacement demand after process ramp-up. SEMI expects global 300mm fab equipment spending to grow strongly in 2026 and 2027, reflecting AI-related logic and memory demand as well as broader supply-chain localization. This supports a positive outlook for process-contact consumables and precision parts, although the annual market trajectory will still be affected by equipment delivery timing, wafer-fab utilization, inventory normalization, and replacement-cycle variability.

From a technology route perspective, the industry is moving toward higher-purity materials, larger 300mm-compatible dimensions, more complex geometries, lower particle generation, tighter metallic contamination control, and better traceability. Suppliers increasingly need integrated capabilities across material sourcing, flame forming, CNC machining, welding, grinding, polishing, precision cleaning, metrology,

and clean packaging. At the same time, substitution pressure is rising in selected high-temperature, high-corrosion, or plasma-intensive applications, where CVD-SiC, SiC-coated graphite, alumina, aluminum nitride, and other advanced ceramics may outperform quartz in lifetime or erosion resistance. Future competition will therefore be shaped not only by quartz fabrication capacity, but also by multi-material capability, co-development with equipment OEMs, local service response, and the ability to pass advanced fab qualification.

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

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

Global Quartz Parts for Semiconductor Equipment market size and forecasts, By Product Form and By Application, in consumption value (\$ Million), 2021-2032

Global Quartz 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 Quartz 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 Quartz 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 Tosoh Quartz Corporation, Heraeus Covantics, Shin-Etsu Quartz Products, SUMCO (JSQ), Momenive Technologies, SiFusion, Techno Quartz Inc., Schunk Xycarb Technology, Worldex, Mitsubishi Materials, etc.

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

### Market segmentation

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

### Market segment By Product Form

Quartz Process Tubes

Quartz Boats and Carriers

Quartz Rings and Shields

Quartz Windows and Bell Jars

Quartz Liners and Chambers

Quartz Tanks and Wet Process Parts

Other Quartz Parts

### Market segment By Material Route

Natural Fused Quartz

Synthetic Fused Silica

Opaque Quartz

Clear Quartz

Other Quartz Materials

#### Market segment By Customer Type

Semiconductor Equipment OEMs

Wafer Fabs/IDMs/Foundries

#### Market segment By Application

Diffusion and Oxidation

LPCVD and CVD/PECVD

Etching

Epitaxy

Wet Cleaning and Wet Etching

RTP and Annealing

Wafer Handling and Storage

Other Process Applications

Market segment by players, this report covers

Tosoh Quartz Corporation

Heraeus Covantics

Shin-Etsu Quartz Products

SUMCO (JSQ)

Momentive Technologies

SiFusion

Techno Quartz Inc.

Schunk Xycarb Technology

Worldex

Mitsubishi Materials

WONIK QnC Corporation

AGC

QSIL SE / QSIL GmbH

OHARA QUARTZ

Young Shin Quartz

Kumkang Quartz

Ferrotec

Maruwa

BCnC Co., LTD.

DS Techno

TKG Solmics

CoorsTek

Raesch Quarz

Feilihua

Beijing Kaide

Jiangsu Pacific Quartz

Shanghai Qianghua Industrial

Shenyang Hanntek Semiconductor Material

Huzhou DKEQ Electronic Quartz

MeiJing Material (Zhejiang) Co., Ltd

Ojing Science & Technology

Jinzhou Youxin Quartz Technology

Beijing YESEMI

Anhui Sixiang Semiconductor Materials Technology

Forcera Materials

Futong Quartz

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

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

Chapter 3, the Quartz 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 Product Form and By Application, with consumption value and growth rate By Product Form, 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 Quartz Parts for Semiconductor Equipment market forecast, by regions, By Product Form 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 Quartz Parts for Semiconductor Equipment.

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