

Global Semiconductor Equipment Spare Parts Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Equipment Spare Parts market size is expected to reach \$ 77154 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Semiconductor equipment spare parts refer to critical components, functional modules, and subsystems directly used in front-end wafer fabrication tools, back-end packaging and test equipment, and related maintenance systems. They perform key functions such as high-precision motion and support, ultra-clean gas/liquid/vacuum control, RF and power control, temperature and pressure management, optical transmission and imaging, process monitoring, automation handling, contamination control, and stable long-term tool operation.

From an application perspective, these products are used in thin-film deposition, etching, lithography, ion implantation, thermal processing, CMP, metrology and inspection, coating and developing, and other semiconductor equipment. As advanced logic, HBM, advanced packaging, power devices, and regional fab construction continue to expand, tool complexity, process stability requirements, and spare-part security requirements are rising simultaneously. According to the attached QYResearch report, deposition and etching equipment together accounted for 47.78% of semiconductor parts demand in 2025, while lithography equipment accounted for 13.52% and metrology and inspection equipment accounted for 12.18%.

Demand growth is mainly driven by AI servers, advanced logic, HBM, 3D NAND, advanced packaging, and regional fab capex. On the supply side, leading vendors are strengthening their positions in vacuum/fluid control, high-end optics, ceramic/quartz/silicon parts, RF power, gas delivery, sensors, automation modules, and

localized service networks. SEMI projects global semiconductor manufacturing equipment sales to reach US\$133 billion in 2025, US\$145 billion in 2026, and US\$156 billion in 2027; WSTS forecasts the global semiconductor market to reach around US\$975 billion in 2026, led by Logic and Memory.

The global competitive landscape is characterized by platform leaders, oligopolistic niche segments, and accelerating regional substitution. The first tier includes platform or system-level leaders such as ZEISS, ASML, Applied Materials, Lam Research, and Atlas Copco's Edwards/Leybold. The second tier includes specialized leaders such as MKS, UCT, Entegris, VAT, HORIBA, Advanced Energy, Brooks, Pall, Fujikin, Kyocera, CoorsTek, Ebara, Ferrotec, NGK, and TOTO Advanced Ceramics. The third tier consists of regional precision manufacturing, ceramics, quartz, vacuum, fluid-control, and mechatronics suppliers in China, Japan, Korea, Taiwan, and Europe. According to the attached report, the top five vendors accounted for around 33.8% of the market in 2025, while the top ten accounted for about 49%. VAT also disclosed that its market share in semiconductor and semiconductor-related vacuum valves reached around 70%, confirming the strong specialization and customer stickiness of high-end niche markets.

By product type, Semiconductor Equipment Spare Parts can be classified into mechanical parts, gas/liquid/vacuum systems, mechatronics, electrical parts, instruments and meters, optical parts, and other types. In 2025, mechanical parts remained the largest category with a share of 29.98%, followed by gas/liquid/vacuum systems at 17.66%, instruments and meters at 14.37%, and optical parts at 14.11%. Mechanical parts remain the volume base, but the value center is shifting toward ultra-clean fluid and vacuum control, RF/power control, process monitoring, high-end optics, ceramic/quartz/silicon process parts, and modular subsystems. By application, deposition, etching, lithography, and metrology/inspection remain the core demand areas, while advanced packaging, test, and heterogeneous integration will further increase the importance of back-end-related parts.

Regionally, the United States, Europe, and Japan still dominate high-end optics, core vacuum valves, selected high-end fluid-control components, key instruments, and system-level modules. Korea, Taiwan, and mainland China are fast-growing consumption markets supported by wafer fabs, memory, OSAT capacity, and local equipment supply chains. According to the attached report, by company headquarters, North America, Europe, and Japan together accounted for nearly 88.5% of the global market in 2025. China's share increased from 3.65% in 2021 to 5.88% in 2025 and is expected to reach 9.01% by 2032, indicating that regional substitution is becoming a

structural trend.

The upstream value chain includes high-purity metals, advanced ceramics, quartz, silicon materials, fluoropolymers, sealing materials, precision-machined parts, sensors, valves, pumps, MFCs, RF power supplies, motion-control components, optical materials, and ultra-clean processing services. The midstream consists of mechanical structures, gas/liquid/vacuum systems, ceramic/quartz/silicon parts, electrical and RF components, instruments, optical parts, automation handling modules, thermal-control parts, and contamination-control components. Downstream direct customers are semiconductor equipment OEMs and service organizations, while end demand comes from Foundry, IDM, Memory fabs, and OSATs. Key barriers lie in co-development with tool platforms, material purity, particle control, corrosion and plasma resistance, long-term reliability, customer qualification, batch consistency, global delivery, and local service capability.

Policy support is strengthening across major regions. CHIPS for America continues to support semiconductor manufacturing and supply-chain capacity, and NIST notes that CHIPS-funded clusters are expected to be supported by dozens of suppliers. The European Chips Act establishes a framework around manufacturing capacity, security of supply, and supply-chain resilience. Korea announced plans in 2024 to expand its semiconductor ecosystem fund to KRW1.1 trillion, covering materials, parts, equipment, and fabless companies. In China, policies continue to focus on strengthening the integrated-circuit supply chain, equipment and material breakthroughs, tax support, industrial parks, and first-tool/first-batch validation.

Over the next several years, the industry will benefit from AI computing, advanced nodes, HBM, advanced packaging, regional fab construction, and long-term equipment service demand. However, it will also face challenges such as long qualification cycles, high customer entry barriers, constraints in critical materials and high-end processing equipment, trade compliance risks, pricing pressure, inventory volatility, and cyclical fluctuations in downstream capex. Overall, the industry is expected to evolve toward high-end platform concentration, oligopolistic niche markets, regional substitution, and long-life service/spare-part systems. Chinese suppliers are likely to find opportunities in vacuum and fluid control, precision mechanical parts, ceramic/quartz/silicon parts, thermal control, selected electrical and sensor modules, advanced-packaging equipment parts, and localized service networks.

This report studies the global Semiconductor Equipment Spare Parts demand, key companies, and key regions.

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

Highlights and key features of the study

Global Semiconductor Equipment Spare Parts total market, 2021-2032, (USD Million)
Global Semiconductor Equipment Spare Parts total market by region & country, CAGR, 2021-2032, (USD Million)
U.S. VS China: Semiconductor Equipment Spare Parts total market, key domestic companies, and share, (USD Million)
Global Semiconductor Equipment Spare Parts revenue by player, revenue and market share 2021-2026, (USD Million)
Global Semiconductor Equipment Spare Parts total market by Product Type, CAGR, 2021-2032, (USD Million)
Global Semiconductor Equipment Spare Parts total market by Equipment Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Semiconductor Equipment Spare Parts 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 ZEISS, MKS Instruments, Atlas Copco (Leybold, and Edwards Vacuum), NGK Insulators, Applied Materials, Inc. (AMAT), Lam Research, Advanced Energy, HORIBA, VAT Vakuumventile, Entegris, 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 Semiconductor Equipment Spare Parts market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Product Type, and by Equipment 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 Semiconductor Equipment Spare Parts Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Equipment Spare Parts Market, Segmentation by Product Type:

Mechanical Parts

Gas/Liquid/Vacuum System

Mechatronics

Electrical

Instruments

Optical Parts

Others

Global Semiconductor Equipment Spare Parts Market, Segmentation by Material Type:

Metal-Based Components

Ceramic Components

Quartz Components

Silicon / SiC Components

Graphite Components

Polymer / Sealing Components

Optical Glass / Crystal Components

Other

Global Semiconductor Equipment Spare Parts Market, Segmentation by Wafer Size:

300mm Wafer Equipment Parts

200mm Wafer Equipment Parts

150mm and Below Equipment Parts

Global Semiconductor Equipment Spare Parts Market, Segmentation by Equipment Application:

Deposition

Semiconductor Etch Equipment

Lithography Machines

Ion Implant

Heat Treatment Equipment

CMP

Metrology and Inspection

Track

Others

Companies Profiled:

ZEISS

MKS Instruments

Atlas Copco (Leybold, and Edwards Vacuum)

NGK Insulators

Applied Materials, Inc. (AMAT)

Lam Research

Advanced Energy

HORIBA

VAT Vakuumventile

Entegris

Ichor Systems

Ultra Clean Holdings Inc. (UCT)

ASML

Pall

Camfil

Ebara Corporation

SHINKO

TOTO Advanced Ceramics

Kyocera

Ferrotec

Schunk Xycarb Technology

MiCo Ceramics Co., Ltd.

Morgan Advanced Materials

Niterra Co., Ltd.

Coorstek

Fujikin

Parker

CKD Corporation

Daikin

Foxsemicon Integrated Technology

KITZ SCT

Swagelok

GEM?

Nippon Seisen

SMC Corporation

XP Power (Comdel)

Trumpf

RORZE Corporation

Kawasaki Robotics

DAIHEN Corporation

Hirata Corporation

Yaskawa

Pfeiffer Vacuum GmbH

LOT Vacuum

GST (Global Standard Technology)

Unisem

CSK

JEL Corporation

Advanced Thermal Sciences Corporation (ATS)

Shinwa Controls

Brooks Automation

Tosoh Quartz Corporation

Kashiyama Industries

HandyTube

Dockweiler

Kuze

Watlow (CRC)

Durex Industries

Miraial Co., Ltd.

Sevenstar

Suzhou KemaTek, Inc.

Sinfonia Technology

Konfoong Materials International

Canon ANELVA

Sprint Precision Technologies Co., Ltd

KINGLAI

Shenyang Fortune Precision Equipment Co., Ltd

Comet PCT

Tolerance Technology (Jiangsu)

NHK Spring

Key Questions Answered

1. How big is the global Semiconductor Equipment Spare Parts market?
2. What is the demand of the global Semiconductor Equipment Spare Parts market?
3. What is the year over year growth of the global Semiconductor Equipment Spare

Parts market?

4. What is the total value of the global Semiconductor Equipment Spare Parts market?
5. Who are the Major Players in the global Semiconductor Equipment Spare Parts market?
6. What are the growth factors driving the market demand?

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