

Global Semiconductor Etch Equipment Components Market 2026 by Company, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G0F2F514210DEN.html>

Date: July 2026

Pages: 100

Price: US\$ 3,480.00 (Single User License)

ID: G0F2F514210DEN

Abstracts

According to our (Global Info Research) latest study, the global Semiconductor Etch Equipment Components market size was valued at US\$ 7189 million in 2025 and is forecast to a readjusted size of US\$ 12283 million by 2032 with a CAGR of 8.3% during review period.

Semiconductor etch equipment components refer to dedicated parts, critical subsystems, process kits, consumables, spares and refurbishable assemblies used in dry etch, wet etch, plasma etch, high-aspect-ratio etch, selective etch, atomic layer etch, cryogenic etch, bevel / edge etch and related plasma clean / ash / strip equipment. The scope covers process chambers and chamber hardware, plasma-facing process kits and consumables, wafer chuck / pedestal / heater assemblies, gas injection and distribution hardware, plasma power and matching networks, gas delivery and flow control systems, vacuum and pressure control systems, thermal management and cooling systems, wafer handling and transfer modules, endpoint sensing and diagnostics, wet etch chemical flow paths and wet chamber hardware, as well as control, electrical and software interfaces. These components directly affect etch rate, selectivity, critical dimension uniformity, profile control, edge performance, particle generation, metal contamination, chamber matching, tool uptime and cost of ownership, making them essential to etch tool performance, yield stability and semiconductor manufacturing supply-chain resilience.

Semiconductor etch equipment components should be analyzed as a process-critical supply chain rather than a conventional mechanical parts market. The industry combines high-purity materials, precision machining, plasma control, vacuum technology, thermal management, gas flow control, wafer support, endpoint diagnostics

and contamination control. Under the updated taxonomy, the market is structured across five formal dimensions: product function, etch tool module, material and manufacturing system, etch process / tool type, and replacement attribute / commercial model. The product-function dimension is the primary basis for market sizing, covering process chambers, plasma-facing process kits, ESC / pedestal / wafer heater assemblies, gas injection hardware, RF power and matching networks, MFC / gas box systems, vacuum pumps and valves, chillers, endpoint diagnostics, wet etch flow paths and electrical control interfaces. Lam Research describes etch as the selective removal of films and materials from wafers, with RIE, ALE, conductor etch, dielectric etch and selective etch becoming increasingly important as device structures become more complex.

From a product perspective, the market can be divided into three value groups. The first consists of chamber- and plasma-facing components, including process chambers, vacuum chambers, silicon electrodes, focus rings, edge rings, liners, SiC rings, ceramic liners, coated parts, showerheads and gas distribution plates. The second consists of process-control subsystems, including electrostatic chucks, wafer heaters, pedestals, RF generators, matching networks, MFCs, gas boxes, dry pumps, throttle valves, gate valves, chillers, cryogenic chillers, OES endpoint detectors and residual gas analyzers. The third consists of automation, wet-process and lifecycle-related modules, including transfer chambers, vacuum robots, load locks, control cabinets, PFA / PTFE wet etch tubing, chemical valves, chemical filters, wet spin chambers and concentration monitors. Unlike complete etch tools, these components are supplied through a layered ecosystem that includes OEM captive manufacturing, global platform suppliers, niche material leaders and regional precision manufacturing companies.

From an application perspective, demand is primarily driven by advanced logic / foundry, DRAM, 3D NAND, mature logic, power semiconductors, compound semiconductors, MEMS / sensors and advanced packaging. GAA logic, contact etch, selective etch and atomic layer etch require low-damage plasma control, tighter temperature management, faster gas switching and more sensitive endpoint detection. DRAM and 3D NAND applications such as HARC, capacitor / contact etch, channel hole etch, staircase etch and deep trench etch increase demand for high-power RF, advanced ESCs, focus and edge rings, silicon / SiC / quartz / ceramic process kits and cryogenic chillers. Mature-node fabs, power devices and advanced packaging support demand for wet etch chambers, fluoropolymer flow paths, chemical filtration, bevel etch and specialty etch components. SEMI projects worldwide 300mm fab equipment spending to reach USD 133 billion in 2026 and USD 151 billion in 2027, supported by AI, data center, edge-device demand and regional semiconductor self-sufficiency

initiatives.

From a policy and regional supply-chain perspective, semiconductor manufacturing is shifting from a pure efficiency-driven global model toward a more regionalized structure that balances efficiency, supply security and resilience. In the United States, CHIPS for America supports manufacturing incentives, research and supply-chain capacity building. In Europe, the European Chips Act aims to reinforce the EU semiconductor ecosystem, improve supply-chain resilience and reduce external dependencies. In Japan, METI continues to support semiconductor revitalization and projects such as Rapidus. China, South Korea, Taiwan and Southeast Asia are also strengthening local supply chains through fab expansion and supplier localization. For etch equipment components, these policies do not merely expand end-market demand; they reshape supplier selection logic. Highly process-critical components still rely on long-qualified global leaders, while chamber metal parts, gas boxes, MFCs, RF power modules, chillers, quartz and silicon parts, wet etch fluid paths, coatings and refurbishment services are increasingly subject to localization and second-source strategies.

From a competitive perspective, the global market is characterized by a layered structure consisting of a small number of platform suppliers, multiple niche leaders, OEM captive supply and a broad base of regional long-tail manufacturers. North America is strong in RF power, electrostatic chucks, subsystem outsourcing, filtration, vacuum automation and captive OEM process parts. Japan has one of the most complete ecosystems, covering ESCs, MFCs, quartz parts, ceramics, vacuum products, chillers and wafer handling robots. Europe remains competitive in vacuum valves, RF power, quartz / fused silica, high-end vacuum technology and engineered materials. South Korea has built a local ecosystem around memory fabs, especially in silicon and SiC consumables, chillers, scrubbers and RF-related modules. China is moving from metal chamber parts, gas and chemical delivery, silicon parts, quartz parts, RF power, temperature control and wet etch flow paths into higher-value validated components. Because many suppliers serve multiple WFE segments, including etch, deposition, clean, PVD, diffusion and implant, competitive analysis should not rely solely on total corporate revenue; it should combine product criticality, qualification status, installed base exposure, aftermarket demand, material performance and regional supply capability.

The global semiconductor etch equipment components market growth drivers are fourfold: rising WFE and etch tool demand from AI / HPC, HBM, DRAM and 3D NAND; higher component value per tool driven by GAA, selective etch, ALE, cryogenic etch and HARC; expanding installed-base demand for spares, replacement parts,

consumables, refurbishment and retrofits; and regional supply-chain restructuring that accelerates local supplier validation and second-source introduction. Over the medium to long term, the most strategically important segments will be plasma-facing consumables, ESC / heater / pedestal assemblies, RF power and matching networks, MFC / gas boxes, vacuum valves and dry pumps, cryogenic chillers, endpoint diagnostics and process kit refurbishment.

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

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

Global Semiconductor Etch Equipment Components market size and forecasts, By Product Function and By Etch Process/Tool Type, in consumption value (\$ Million), 2021-2032

Global Semiconductor Etch Equipment Components 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 Semiconductor Etch Equipment Components

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 Semiconductor Etch Equipment Components 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 Hana Materials, VAT Group, EBARA, Edwards Vacuum, HORIBA STEC, Fujikin, SHINKO Electric, TOTO Advanced Ceramics, Kyocera, Ichor Systems, etc.

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

Market segmentation

Semiconductor Etch Equipment Components market is split By Product Function and By Etch Process/Tool Type. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value By Product Function and By Etch Process/Tool Type. This analysis can help you expand your business by targeting qualified niche markets.

Market segment By Product Function

Process Chamber & Chamber Hardware

Plasma-facing Process Kits & Consumables

Wafer Chuck, Pedestal & Heater Assembly

Gas Injection & Distribution Hardware

Plasma Power & Matching

Gas Delivery & Flow Control

Vacuum & Pressure Control

Thermal Management & Cooling

Wafer Handling & Transfer Modules

Endpoint, Sensing & Diagnostics

Wet Etch Chemical Path & Wet Chamber Hardware

Control, Electrical & Software Interface

Market segment By Material

Silicon-based Parts

Silicon Carbide-based Parts

Quartz/Fused Silica Parts

Advanced Ceramic Parts

Coated Metal/Coated Ceramic Parts

Metal Precision Structures

Fluoropolymer Fluid Handling Parts

Electronic/Electromechanical Modules

Elastomer/Seal Parts

Composite/Bonded Assemblies

Other Specialty Materials

Market segment By Etch Tool Module

Process Module/Process Chamber

Transfer Module

Load Lock Module

Gas Box/Gas Delivery Module

RF Power Module

Vacuum Pumping Module

Temperature Control Module

Endpoint/Sensor Module

Wet Etch Process Module

Control Cabinet/Electrical Module

Market segment By Etch Process/Tool Type

Dielectric Etch Tools

Conductor Etch Tools

High Aspect Ratio Etch Tools

Selective Etch Tools

Atomic Layer Etch Tools

Cryogenic Etch Tools

Bevel/Edge Etch Tools

Wet Etch Tools

Others

Market segment by players, this report covers

Hana Materials

VAT Group

EBARA

Edwards Vacuum

HORIBA STEC

Fujikin

SHINKO Electric

TOTO Advanced Ceramics

Kyocera

Ichor Systems

Ultra Clean Holdings

Comet PCT

TRUMPF Höttinger

Shinwa Controls

Advanced Thermal Sciences

GST

Tosoh Quartz

Heraeus Covantics

Techno Quartz / GL TECHNO

Ferrotec

RORZE

Brooks Automation

Verity Instruments

Pall Corporation

Parker Hannifin

Sifusion

Morgan Advanced Materials

Azbil

CKD

ULVAC

Kashiyama

Osaka Vacuum

Brooks Instrument

Swagelok

Nippon Pillar

Saint-Gobain

Cobetter

Worldex

Foxsemicon

Jingyi Equipment

ThinkonSemi (Fujian Dynafine)

Mitsubishi Materials

NGK Insulators

Niterra Co., Ltd.

ASUZAC Fine Ceramics

Japan Fine Ceramics Co., Ltd. (JFC)

Maruwa

CMTX Co.,Ltd

KC Parts Tech., Ltd.

RS Technologies Co., Ltd.

Tosoh Quartz Corporation

Shin-Etsu Quartz Products

SUMCO (JSQ)

Momentive Technologies

TKG Solmics

Schunk Xycarb Technology

MiCo Ceramics

WONIK QnC

Micro Ceramics Ltd

Suzhou KemaTek, Inc.

Tokai Carbon

Mersen

SGL Carbon

Toyo Tanso

Sumitomo Osaka Cement

Hunan Dezhi New Materials

Shenzhen Zhicheng Semiconductor Materials

Chengdu Ultra Pure Applied Materials

Chongqing Genori Technology Co., Ltd

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 Semiconductor Etch Equipment Components product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Semiconductor Etch Equipment Components 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 Function and By Etch Process/Tool Type, with consumption value and growth rate By Product Function, By Etch Process/Tool Type, 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 Semiconductor Etch Equipment Components market forecast, by regions, By Product Function and By Etch Process/Tool Type, 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 Semiconductor Etch Equipment Components.

Chapter 13, to describe Semiconductor Etch Equipment Components research findings and conclusion.

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