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Global Semiconductor Process-Exposed Parts Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Process-Exposed Parts market size is expected to reach $ 16914 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

Semiconductor Process-Exposed Parts are high-purity, precision-engineered components installed inside semiconductor front-end process chambers, plasma zones, furnace tubes, gas-reaction paths and other critical process areas. These components are directly exposed to plasma, process gases, reaction by-products, deposited films, elevated temperatures or semiconductor wafers, and therefore have a direct impact on gas distribution, plasma uniformity, wafer-edge process control, thermal uniformity, particle generation, metallic contamination and process yield. They are commonly manufactured from high-purity silicon, fused or synthetic quartz, solid or CVD silicon carbide, alumina, aluminum nitride, yttria, YAG, graphite, coated graphite and specially treated metals. Representative products include electrodes, showerheads, focus rings, edge rings, process tubes, quartz boats, chamber liners, shields, gas distribution plates, susceptors, nozzles, windows and process kits. These products are characterized by progressive erosion, corrosion, film accumulation or performance drift during wafer processing and are consequently cleaned, refurbished or replaced according to wafer counts, RF exposure hours, deposited-film thickness or preventive-maintenance schedules.

Semiconductor process-exposed parts constitute a high-barrier consumables and critical-components market rather than a conventional precision-machining industry. Although products such as focus rings, showerheads, quartz boats and chamber liners may appear structurally straightforward, their commercial qualification depends on material purity, dimensional consistency, surface condition, particle performance,

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plasma resistance and process-specific lifetime stability. Demand is generated through both original equipment installation and recurring replacement. New fab and equipment investment determines initial component demand, while the installed equipment base, number of process chambers, wafer throughput and preventive-maintenance cycles generate a recurring aftermarket.

The global supply structure is highly specialized by material and region. North American and European suppliers maintain strong positions in OEM-affiliated silicon components, advanced ceramics, high-purity quartz and coated graphite. Japanese suppliers have established broad capabilities across quartz, graphite, silicon carbide and precision ceramics. South Korea has developed a dense cluster of specialized silicon-electrode, focus-ring, synthetic-quartz and plasma-resistant ceramic suppliers. Taiwan has a meaningful base of regional quartzware and ceramic-component manufacturers, while mainland China is expanding rapidly in silicon parts, fabricated quartzware and plasma-facing metal process kits. The broader supplier pool is considerably larger than the core formal list because many regional manufacturers disclose limited financial, qualification and customer information.

Future market growth will be driven by process complexity in addition to wafer-capacity expansion. Higher aspect-ratio structures, additional etch and deposition steps, 3D NAND layer migration, advanced DRAM and HBM investment, and tighter contamination requirements increase component exposure and replacement intensity. Technology development is moving toward synthetic high-purity quartz, solid and CVD silicon carbide, yttria- and YAG-based plasma-resistant ceramics, advanced ceramic coatings and integrated component-refurbishment capabilities. Competitive advantage will increasingly depend on joint development with equipment OEMs and wafer manufacturers, local qualification capability, consistent multi-batch performance and lifecycle cost rather than component price alone.

Report Scope

This report studies the global Semiconductor Process-Exposed Parts demand, key companies, and key regions.

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

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Highlights and key features of the study

Global Semiconductor Process-Exposed Parts total market, 2021-2032, (USD Million)

Global Semiconductor Process-Exposed Parts total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Semiconductor Process-Exposed Parts total market, key domestic companies, and share, (USD Million)

Global Semiconductor Process-Exposed Parts revenue by player, revenue and market share 2021-2026, (USD Million)

Global Semiconductor Process-Exposed Parts total market by Primary Material, CAGR, 2021-2032, (USD Million)

Global Semiconductor Process-Exposed Parts total market by Process Step, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Semiconductor Process-Exposed 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 Lam Research (Silfex), Entegris, Inc., CoorsTek, Inc., Ferrotec Holdings Corporation, Schunk Xycarb Technology, WONIK QnC Corporation, Tokai Carbon Co., Ltd, Heraeus Covantics, Tosoh Corporation (Tosoh Quartz), SGL Carbon SE, 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 Process-Exposed Parts market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$

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Millions), by player, by regions, by Primary Material, and by Process Step. 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 Process-Exposed Parts Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Semiconductor Process-Exposed Parts Market, Segmentation by Primary Material:

Silicon Parts

Quartz Parts

Silicon Carbide Parts

Advanced Ceramic Parts

Graphite & Coated Graphite Parts

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Plasma-facing Metal Process Kits

Global Semiconductor Process-Exposed Parts Market, Segmentation by Customer Type:

Equipment OEMs

IDMs and Foundries

Memory Manufacturers

Specialty / Compound Semiconductor Fabs

Global Semiconductor Process-Exposed Parts Market, Segmentation by Part Lifecycle:

New OEM Parts

New Replacement Parts

Refurbished / Reconditioned Parts

Global Semiconductor Process-Exposed Parts Market, Segmentation by Process Step:

Etch & Ashing

CVD / ALD / Epitaxy

PVD

Diffusion / Oxidation / Anneal

Ion Implant

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Wet / Cleaning Process Chambers

Other Front-end Processes

Companies Profiled:

Lam Research (Silfex)

Entegris, Inc.

CoorsTek, Inc.

Ferrotec Holdings Corporation

Schunk Xycarb Technology

WONIK QnC Corporation

Tokai Carbon Co., Ltd

Heraeus Covantics

Tosoh Corporation (Tosoh Quartz)

SGL Carbon SE

Mersen S.A.

HANA Materials Inc.

Worldex Industry & Trading

KYOCERA Corporation

Momentive Technologies

Morgan Advanced Materials plc

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CeramTec GmbH

TOTO Advanced Ceramics

UCT (Ultra Clean Holdings, Inc)

Kurita (Pentagon Technologies)

Enpro Industries (LeanTeq and NxEdge)

TOCALO Co., Ltd.

KoMiCo

Cinos

Hansol IONES

WONIK QnC

Toyo Tanso Co., Ltd.

BCnC Co., Ltd.

MiCo Ceramics Co., Ltd.

Mitsubishi Materials

CMTX Inc.

MARUWA CO., LTD.

Shin-Etsu Quartz Products

Techno Quartz Inc.

ASUZAC Inc.

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Nippon Techno-Carbon

JFM Co., Ltd.

NISHIMURA ADVANCED CERAMICS

Niterra Co., Ltd.

NGK INSULATORS, LTD.

Kumkang Quartz Co., Ltd.

Segi Tech Co., Ltd.

Sunny Tech Co., Ltd.

Jinsung Q&S Co., Ltd.

Touch-Down Technology Co., Ltd.

Foxsemicon Integrated Technology Inc.

XIDE Technology Co., Ltd.

IDS Technology Co., Ltd.

Coalition Technology Co., Ltd.

Ningxia Dunyuanjuxin Semiconductor Technology Corporation

ThinkonSemi (Fujian Dynafine)

Shenyang Fortune Precision Equipment Co., Ltd.

Konfoong Materials International Co., Ltd.

Chongqing Genori Technology Co., Ltd

Suzhou KemaTek, Inc.

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Chengdu Ultra Pure Applied Materials (UPAM)

ZhiCheng Semiconductor

Hunan Dezhi New Material

Key Questions Answered

1. How big is the global Semiconductor Process-Exposed Parts market?
2. What is the demand of the global Semiconductor Process-Exposed Parts market?
3. What is the year over year growth of the global Semiconductor Process-Exposed Parts market?
4. What is the total value of the global Semiconductor Process-Exposed Parts market?
5. Who are the Major Players in the global Semiconductor Process-Exposed Parts market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Semiconductor Process-Exposed Parts Introduction
1.2 World Semiconductor Process-Exposed Parts Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Semiconductor Process-Exposed Parts Total Market by Region (by Headquarter Location)
  1.3.1 World Semiconductor Process-Exposed Parts Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.3 China Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.4 Europe Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.5 Japan Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.6 South Korea Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.7 ASEAN Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
  1.3.8 India Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Semiconductor Process-Exposed Parts Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.2 World Semiconductor Process-Exposed Parts Consumption Value by Region
  2.2.1 World Semiconductor Process-Exposed Parts Consumption Value by Region (2021-2026)
  2.2.2 World Semiconductor Process-Exposed Parts Consumption Value Forecast by Region (2027-2032)
2.3 United States Semiconductor Process-Exposed Parts Consumption Value

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(2021-2032)
2.4 China Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.5 Europe Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.6 Japan Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.7 South Korea Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.8 ASEAN Semiconductor Process-Exposed Parts Consumption Value (2021-2032)
2.9 India Semiconductor Process-Exposed Parts Consumption Value (2021-2032)

3 WORLD SEMICONDUCTOR PROCESS-EXPOSED PARTS COMPANIES COMPETITIVE ANALYSIS

3.1 World Semiconductor Process-Exposed Parts Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Semiconductor Process-Exposed Parts Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Semiconductor Process-Exposed Parts in 2025
  3.2.3 Global Concentration Ratios (CR8) for Semiconductor Process-Exposed Parts in 2025
3.3 Semiconductor Process-Exposed Parts Company Evaluation Quadrant
3.4 Semiconductor Process-Exposed Parts Market: Overall Company Footprint Analysis
  3.4.1 Semiconductor Process-Exposed Parts Market: Region Footprint
  3.4.2 Semiconductor Process-Exposed Parts Market: Company Product Type Footprint
  3.4.3 Semiconductor Process-Exposed Parts Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Semiconductor Process-Exposed Parts Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Semiconductor Process-Exposed Parts Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)

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4.1.2 United States VS China: Semiconductor Process-Exposed Parts Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: Semiconductor Process-Exposed Parts Consumption Value Comparison
4.2.1 United States VS China: Semiconductor Process-Exposed Parts Consumption Value Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Semiconductor Process-Exposed Parts Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Semiconductor Process-Exposed Parts Companies and Market Share, 2021-2026
4.3.1 United States Based Semiconductor Process-Exposed Parts Companies, Headquarters (States, Country)
4.3.2 United States Based Companies Semiconductor Process-Exposed Parts Revenue, (2021-2026)
4.4 China Based Companies Semiconductor Process-Exposed Parts Revenue and Market Share, 2021-2026
4.4.1 China Based Semiconductor Process-Exposed Parts Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies Semiconductor Process-Exposed Parts Revenue, (2021-2026)
4.5 Rest of World Based Semiconductor Process-Exposed Parts Companies and Market Share, 2021-2026
4.5.1 Rest of World Based Semiconductor Process-Exposed Parts Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies Semiconductor Process-Exposed Parts Revenue (2021-2026)

5 MARKET ANALYSIS BY PRIMARY MATERIAL

5.1 World Semiconductor Process-Exposed Parts Market Size Overview by Primary Material: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Primary Material
5.2.1 Silicon Parts
5.2.2 Quartz Parts
5.2.3 Silicon Carbide Parts
5.2.4 Advanced Ceramic Parts
5.2.5 Graphite & Coated Graphite Parts
5.2.6 Plasma-facing Metal Process Kits
5.3 Market Segment by Primary Material

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5.3.1 World Semiconductor Process-Exposed Parts Market Size by Primary Material (2021-2026)
5.3.2 World Semiconductor Process-Exposed Parts Market Size by Primary Material (2027-2032)
5.3.3 World Semiconductor Process-Exposed Parts Market Size Market Share by Primary Material (2027-2032)

6 MARKET ANALYSIS BY CUSTOMER TYPE

6.1 World Semiconductor Process-Exposed Parts Market Size Overview by Customer Type: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Customer Type
6.2.1 Equipment OEMs
6.2.2 IDMs and Foundries
6.2.3 Memory Manufacturers
6.2.4 Specialty / Compound Semiconductor Fabs
6.3 Market Segment by Customer Type
6.3.1 World Semiconductor Process-Exposed Parts Market Size by Customer Type (2021-2026)
6.3.2 World Semiconductor Process-Exposed Parts Market Size by Customer Type (2027-2032)
6.3.3 World Semiconductor Process-Exposed Parts Market Size Market Share by Customer Type (2027-2032)

7 MARKET ANALYSIS BY PART LIFECYCLE

7.1 World Semiconductor Process-Exposed Parts Market Size Overview by Part Lifecycle: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Part Lifecycle
7.2.1 New OEM Parts
7.2.2 New Replacement Parts
7.2.3 Refurbished / Reconditioned Parts
7.3 Market Segment by Part Lifecycle
7.3.1 World Semiconductor Process-Exposed Parts Market Size by Part Lifecycle (2021-2026)
7.3.2 World Semiconductor Process-Exposed Parts Market Size by Part Lifecycle (2027-2032)
7.3.3 World Semiconductor Process-Exposed Parts Market Size Market Share by Part Lifecycle (2027-2032)

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info@marketpublishers.com

8 MARKET ANALYSIS BY PROCESS STEP

8.1 World Semiconductor Process-Exposed Parts Market Size Overview by Process Step: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Process Step
  8.2.1 Etch & Ashing
  8.2.2 CVD / ALD / Epitaxy
  8.2.3 PVD
  8.2.4 Diffusion / Oxidation / Anneal
  8.2.5 Ion Implant
  8.2.6 Wet / Cleaning Process Chambers
  8.2.7 Other Front-end Processes
8.3 Market Segment by Process Step
  8.3.1 World Semiconductor Process-Exposed Parts Market Size by Process Step (2021-2026)
  8.3.2 World Semiconductor Process-Exposed Parts Market Size by Process Step (2027-2032)
  8.3.3 World Semiconductor Process-Exposed Parts Market Size Market Share by Process Step (2021-2032)

9 COMPANY PROFILES

9.1 Lam Research (Silfex)
  9.1.1 Lam Research (Silfex) Details
  9.1.2 Lam Research (Silfex) Major Business
  9.1.3 Lam Research (Silfex) Semiconductor Process-Exposed Parts Product and Services
  9.1.4 Lam Research (Silfex) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
  9.1.5 Lam Research (Silfex) Recent Developments/Updates
  9.1.6 Lam Research (Silfex) Competitive Strengths & Weaknesses
9.2 Entegris, Inc.
  9.2.1 Entegris, Inc. Details
  9.2.2 Entegris, Inc. Major Business
  9.2.3 Entegris, Inc. Semiconductor Process-Exposed Parts Product and Services
  9.2.4 Entegris, Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
  9.2.5 Entegris, Inc. Recent Developments/Updates

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9.2.6 Entegris, Inc. Competitive Strengths & Weaknesses
9.3 CoorsTek, Inc.
9.3.1 CoorsTek, Inc. Details
9.3.2 CoorsTek, Inc. Major Business
9.3.3 CoorsTek, Inc. Semiconductor Process-Exposed Parts Product and Services
9.3.4 CoorsTek, Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 CoorsTek, Inc. Recent Developments/Updates
9.3.6 CoorsTek, Inc. Competitive Strengths & Weaknesses
9.4 Ferrotec Holdings Corporation
9.4.1 Ferrotec Holdings Corporation Details
9.4.2 Ferrotec Holdings Corporation Major Business
9.4.3 Ferrotec Holdings Corporation Semiconductor Process-Exposed Parts Product and Services
9.4.4 Ferrotec Holdings Corporation Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Ferrotec Holdings Corporation Recent Developments/Updates
9.4.6 Ferrotec Holdings Corporation Competitive Strengths & Weaknesses
9.5 Schunk Xycarb Technology
9.5.1 Schunk Xycarb Technology Details
9.5.2 Schunk Xycarb Technology Major Business
9.5.3 Schunk Xycarb Technology Semiconductor Process-Exposed Parts Product and Services
9.5.4 Schunk Xycarb Technology Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Schunk Xycarb Technology Recent Developments/Updates
9.5.6 Schunk Xycarb Technology Competitive Strengths & Weaknesses
9.6 WONIK QnC Corporation
9.6.1 WONIK QnC Corporation Details
9.6.2 WONIK QnC Corporation Major Business
9.6.3 WONIK QnC Corporation Semiconductor Process-Exposed Parts Product and Services
9.6.4 WONIK QnC Corporation Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 WONIK QnC Corporation Recent Developments/Updates
9.6.6 WONIK QnC Corporation Competitive Strengths & Weaknesses
9.7 Tokai Carbon Co., Ltd
9.7.1 Tokai Carbon Co., Ltd Details
9.7.2 Tokai Carbon Co., Ltd Major Business

+357 96 030922
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9.7.3 Tokai Carbon Co., Ltd Semiconductor Process-Exposed Parts Product and Services
9.7.4 Tokai Carbon Co., Ltd Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Tokai Carbon Co., Ltd Recent Developments/Updates
9.7.6 Tokai Carbon Co., Ltd Competitive Strengths & Weaknesses
9.8 Heraeus Covantics
9.8.1 Heraeus Covantics Details
9.8.2 Heraeus Covantics Major Business
9.8.3 Heraeus Covantics Semiconductor Process-Exposed Parts Product and Services
9.8.4 Heraeus Covantics Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 Heraeus Covantics Recent Developments/Updates
9.8.6 Heraeus Covantics Competitive Strengths & Weaknesses
9.9 Tosoh Corporation (Tosoh Quartz)
9.9.1 Tosoh Corporation (Tosoh Quartz) Details
9.9.2 Tosoh Corporation (Tosoh Quartz) Major Business
9.9.3 Tosoh Corporation (Tosoh Quartz) Semiconductor Process-Exposed Parts Product and Services
9.9.4 Tosoh Corporation (Tosoh Quartz) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Tosoh Corporation (Tosoh Quartz) Recent Developments/Updates
9.9.6 Tosoh Corporation (Tosoh Quartz) Competitive Strengths & Weaknesses
9.10 SGL Carbon SE
9.10.1 SGL Carbon SE Details
9.10.2 SGL Carbon SE Major Business
9.10.3 SGL Carbon SE Semiconductor Process-Exposed Parts Product and Services
9.10.4 SGL Carbon SE Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 SGL Carbon SE Recent Developments/Updates
9.10.6 SGL Carbon SE Competitive Strengths & Weaknesses
9.11 Mersen S.A.
9.11.1 Mersen S.A. Details
9.11.2 Mersen S.A. Major Business
9.11.3 Mersen S.A. Semiconductor Process-Exposed Parts Product and Services
9.11.4 Mersen S.A. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Mersen S.A. Recent Developments/Updates
9.11.6 Mersen S.A. Competitive Strengths & Weaknesses

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9.12 HANA Materials Inc.
9.12.1 HANA Materials Inc. Details
9.12.2 HANA Materials Inc. Major Business
9.12.3 HANA Materials Inc. Semiconductor Process-Exposed Parts Product and Services
9.12.4 HANA Materials Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 HANA Materials Inc. Recent Developments/Updates
9.12.6 HANA Materials Inc. Competitive Strengths & Weaknesses
9.13 Worldex Industry & Trading
9.13.1 Worldex Industry & Trading Details
9.13.2 Worldex Industry & Trading Major Business
9.13.3 Worldex Industry & Trading Semiconductor Process-Exposed Parts Product and Services
9.13.4 Worldex Industry & Trading Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 Worldex Industry & Trading Recent Developments/Updates
9.13.6 Worldex Industry & Trading Competitive Strengths & Weaknesses
9.14 KYOCERA Corporation
9.14.1 KYOCERA Corporation Details
9.14.2 KYOCERA Corporation Major Business
9.14.3 KYOCERA Corporation Semiconductor Process-Exposed Parts Product and Services
9.14.4 KYOCERA Corporation Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 KYOCERA Corporation Recent Developments/Updates
9.14.6 KYOCERA Corporation Competitive Strengths & Weaknesses
9.15 Momentive Technologies
9.15.1 Momentive Technologies Details
9.15.2 Momentive Technologies Major Business
9.15.3 Momentive Technologies Semiconductor Process-Exposed Parts Product and Services
9.15.4 Momentive Technologies Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 Momentive Technologies Recent Developments/Updates
9.15.6 Momentive Technologies Competitive Strengths & Weaknesses
9.16 Morgan Advanced Materials plc
9.16.1 Morgan Advanced Materials plc Details
9.16.2 Morgan Advanced Materials plc Major Business

+357 96 030922
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9.16.3 Morgan Advanced Materials plc Semiconductor Process-Exposed Parts Product and Services
9.16.4 Morgan Advanced Materials plc Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.16.5 Morgan Advanced Materials plc Recent Developments/Updates
9.16.6 Morgan Advanced Materials plc Competitive Strengths & Weaknesses
9.17 CeramTec GmbH
9.17.1 CeramTec GmbH Details
9.17.2 CeramTec GmbH Major Business
9.17.3 CeramTec GmbH Semiconductor Process-Exposed Parts Product and Services
9.17.4 CeramTec GmbH Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.17.5 CeramTec GmbH Recent Developments/Updates
9.17.6 CeramTec GmbH Competitive Strengths & Weaknesses
9.18 TOTO Advanced Ceramics
9.18.1 TOTO Advanced Ceramics Details
9.18.2 TOTO Advanced Ceramics Major Business
9.18.3 TOTO Advanced Ceramics Semiconductor Process-Exposed Parts Product and Services
9.18.4 TOTO Advanced Ceramics Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.18.5 TOTO Advanced Ceramics Recent Developments/Updates
9.18.6 TOTO Advanced Ceramics Competitive Strengths & Weaknesses
9.19 UCT (Ultra Clean Holdings, Inc)
9.19.1 UCT (Ultra Clean Holdings, Inc) Details
9.19.2 UCT (Ultra Clean Holdings, Inc) Major Business
9.19.3 UCT (Ultra Clean Holdings, Inc) Semiconductor Process-Exposed Parts Product and Services
9.19.4 UCT (Ultra Clean Holdings, Inc) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.19.5 UCT (Ultra Clean Holdings, Inc) Recent Developments/Updates
9.19.6 UCT (Ultra Clean Holdings, Inc) Competitive Strengths & Weaknesses
9.20 Kurita (Pentagon Technologies)
9.20.1 Kurita (Pentagon Technologies) Details
9.20.2 Kurita (Pentagon Technologies) Major Business
9.20.3 Kurita (Pentagon Technologies) Semiconductor Process-Exposed Parts Product and Services
9.20.4 Kurita (Pentagon Technologies) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.20.5 Kurita (Pentagon Technologies) Recent Developments/Updates
9.20.6 Kurita (Pentagon Technologies) Competitive Strengths & Weaknesses
9.21 Enpro Industries (LeanTeq and NxEdge)
9.21.1 Enpro Industries (LeanTeq and NxEdge) Details
9.21.2 Enpro Industries (LeanTeq and NxEdge) Major Business
9.21.3 Enpro Industries (LeanTeq and NxEdge) Semiconductor Process-Exposed Parts Product and Services
9.21.4 Enpro Industries (LeanTeq and NxEdge) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.21.5 Enpro Industries (LeanTeq and NxEdge) Recent Developments/Updates
9.21.6 Enpro Industries (LeanTeq and NxEdge) Competitive Strengths & Weaknesses
9.22 TOCALO Co., Ltd.
9.22.1 TOCALO Co., Ltd. Details
9.22.2 TOCALO Co., Ltd. Major Business
9.22.3 TOCALO Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.22.4 TOCALO Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.22.5 TOCALO Co., Ltd. Recent Developments/Updates
9.22.6 TOCALO Co., Ltd. Competitive Strengths & Weaknesses
9.23 KoMiCo
9.23.1 KoMiCo Details
9.23.2 KoMiCo Major Business
9.23.3 KoMiCo Semiconductor Process-Exposed Parts Product and Services
9.23.4 KoMiCo Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.23.5 KoMiCo Recent Developments/Updates
9.23.6 KoMiCo Competitive Strengths & Weaknesses
9.24 Cinos
9.24.1 Cinos Details
9.24.2 Cinos Major Business
9.24.3 Cinos Semiconductor Process-Exposed Parts Product and Services
9.24.4 Cinos Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.24.5 Cinos Recent Developments/Updates
9.24.6 Cinos Competitive Strengths & Weaknesses
9.25 Hansol IONES
9.25.1 Hansol IONES Details
9.25.2 Hansol IONES Major Business

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9.25.3 Hansol IONES Semiconductor Process-Exposed Parts Product and Services
9.25.4 Hansol IONES Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.25.5 Hansol IONES Recent Developments/Updates
9.25.6 Hansol IONES Competitive Strengths & Weaknesses
9.26 WONIK QnC
9.26.1 WONIK QnC Details
9.26.2 WONIK QnC Major Business
9.26.3 WONIK QnC Semiconductor Process-Exposed Parts Product and Services
9.26.4 WONIK QnC Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.26.5 WONIK QnC Recent Developments/Updates
9.26.6 WONIK QnC Competitive Strengths & Weaknesses
9.27 Toyo Tanso Co., Ltd.
9.27.1 Toyo Tanso Co., Ltd. Details
9.27.2 Toyo Tanso Co., Ltd. Major Business
9.27.3 Toyo Tanso Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.27.4 Toyo Tanso Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.27.5 Toyo Tanso Co., Ltd. Recent Developments/Updates
9.27.6 Toyo Tanso Co., Ltd. Competitive Strengths & Weaknesses
9.28 BCnC Co., Ltd.
9.28.1 BCnC Co., Ltd. Details
9.28.2 BCnC Co., Ltd. Major Business
9.28.3 BCnC Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.28.4 BCnC Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.28.5 BCnC Co., Ltd. Recent Developments/Updates
9.28.6 BCnC Co., Ltd. Competitive Strengths & Weaknesses
9.29 MiCo Ceramics Co., Ltd.
9.29.1 MiCo Ceramics Co., Ltd. Details
9.29.2 MiCo Ceramics Co., Ltd. Major Business
9.29.3 MiCo Ceramics Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.29.4 MiCo Ceramics Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.29.5 MiCo Ceramics Co., Ltd. Recent Developments/Updates
9.29.6 MiCo Ceramics Co., Ltd. Competitive Strengths & Weaknesses

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9.30 Mitsubishi Materials
9.30.1 Mitsubishi Materials Details
9.30.2 Mitsubishi Materials Major Business
9.30.3 Mitsubishi Materials Semiconductor Process-Exposed Parts Product and Services
9.30.4 Mitsubishi Materials Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.30.5 Mitsubishi Materials Recent Developments/Updates
9.30.6 Mitsubishi Materials Competitive Strengths & Weaknesses
9.31 CMTX Inc.
9.31.1 CMTX Inc. Details
9.31.2 CMTX Inc. Major Business
9.31.3 CMTX Inc. Semiconductor Process-Exposed Parts Product and Services
9.31.4 CMTX Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.31.5 CMTX Inc. Recent Developments/Updates
9.31.6 CMTX Inc. Competitive Strengths & Weaknesses
9.32 MARUWA CO., LTD.
9.32.1 MARUWA CO., LTD. Details
9.32.2 MARUWA CO., LTD. Major Business
9.32.3 MARUWA CO., LTD. Semiconductor Process-Exposed Parts Product and Services
9.32.4 MARUWA CO., LTD. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.32.5 MARUWA CO., LTD. Recent Developments/Updates
9.32.6 MARUWA CO., LTD. Competitive Strengths & Weaknesses
9.33 Shin-Etsu Quartz Products
9.33.1 Shin-Etsu Quartz Products Details
9.33.2 Shin-Etsu Quartz Products Major Business
9.33.3 Shin-Etsu Quartz Products Semiconductor Process-Exposed Parts Product and Services
9.33.4 Shin-Etsu Quartz Products Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.33.5 Shin-Etsu Quartz Products Recent Developments/Updates
9.33.6 Shin-Etsu Quartz Products Competitive Strengths & Weaknesses
9.34 Techno Quartz Inc.
9.34.1 Techno Quartz Inc. Details
9.34.2 Techno Quartz Inc. Major Business
9.34.3 Techno Quartz Inc. Semiconductor Process-Exposed Parts Product and

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Services
9.34.4 Techno Quartz Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.34.5 Techno Quartz Inc. Recent Developments/Updates
9.34.6 Techno Quartz Inc. Competitive Strengths & Weaknesses
9.35 ASUZAC Inc.
9.35.1 ASUZAC Inc. Details
9.35.2 ASUZAC Inc. Major Business
9.35.3 ASUZAC Inc. Semiconductor Process-Exposed Parts Product and Services
9.35.4 ASUZAC Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.35.5 ASUZAC Inc. Recent Developments/Updates
9.35.6 ASUZAC Inc. Competitive Strengths & Weaknesses
9.36 Nippon Techno-Carbon
9.36.1 Nippon Techno-Carbon Details
9.36.2 Nippon Techno-Carbon Major Business
9.36.3 Nippon Techno-Carbon Semiconductor Process-Exposed Parts Product and Services
9.36.4 Nippon Techno-Carbon Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.36.5 Nippon Techno-Carbon Recent Developments/Updates
9.36.6 Nippon Techno-Carbon Competitive Strengths & Weaknesses
9.37 JFM Co., Ltd.
9.37.1 JFM Co., Ltd. Details
9.37.2 JFM Co., Ltd. Major Business
9.37.3 JFM Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.37.4 JFM Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.37.5 JFM Co., Ltd. Recent Developments/Updates
9.37.6 JFM Co., Ltd. Competitive Strengths & Weaknesses
9.38 NISHIMURA ADVANCED CERAMICS
9.38.1 NISHIMURA ADVANCED CERAMICS Details
9.38.2 NISHIMURA ADVANCED CERAMICS Major Business
9.38.3 NISHIMURA ADVANCED CERAMICS Semiconductor Process-Exposed Parts Product and Services
9.38.4 NISHIMURA ADVANCED CERAMICS Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.38.5 NISHIMURA ADVANCED CERAMICS Recent Developments/Updates
9.38.6 NISHIMURA ADVANCED CERAMICS Competitive Strengths & Weaknesses

+357 96 030922
info@marketpublishers.com

9.39 Niterra Co., Ltd.
9.39.1 Niterra Co., Ltd. Details
9.39.2 Niterra Co., Ltd. Major Business
9.39.3 Niterra Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
9.39.4 Niterra Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.39.5 Niterra Co., Ltd. Recent Developments/Updates
9.39.6 Niterra Co., Ltd. Competitive Strengths & Weaknesses
9.40 NGK INSULATORS, LTD.
9.40.1 NGK INSULATORS, LTD. Details
9.40.2 NGK INSULATORS, LTD. Major Business
9.40.3 NGK INSULATORS, LTD. Semiconductor Process-Exposed Parts Product and Services
9.40.4 NGK INSULATORS, LTD. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026)
9.40.5 NGK INSULATORS, LTD. Recent Developments/Updates
9.40.6 NGK INSULATORS, LTD. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Semiconductor Process-Exposed Parts Industry Chain
10.2 Semiconductor Process-Exposed Parts Upstream Analysis
10.3 Semiconductor Process-Exposed Parts Midstream Analysis
10.4 Semiconductor Process-Exposed Parts Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Semiconductor Process-Exposed Parts Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Semiconductor Process-Exposed Parts Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Semiconductor Process-Exposed Parts Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Semiconductor Process-Exposed Parts Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Semiconductor Process-Exposed Parts Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Semiconductor Process-Exposed Parts Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Semiconductor Process-Exposed Parts Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Semiconductor Process-Exposed Parts Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Semiconductor Process-Exposed Parts Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Semiconductor Process-Exposed Parts Players in 2025
Table 12. World Semiconductor Process-Exposed Parts Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Semiconductor Process-Exposed Parts Company Evaluation Quadrant
Table 14. Head Office of Key Semiconductor Process-Exposed Parts Players
Table 15. Semiconductor Process-Exposed Parts Market: Company Product Type Footprint
Table 16. Semiconductor Process-Exposed Parts Market: Company Product Application Footprint
Table 17. Semiconductor Process-Exposed Parts Mergers & Acquisitions Activity
Table 18. United States VS China Semiconductor Process-Exposed Parts Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Semiconductor Process-Exposed Parts Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based Semiconductor Process-Exposed Parts Companies,

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Headquarters (States, Country)
Table 21. United States Based Companies Semiconductor Process-Exposed Parts Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Semiconductor Process-Exposed Parts Revenue Market Share (2021-2026)
Table 23. China Based Semiconductor Process-Exposed Parts Companies, Headquarters (Province, Country)
Table 24. China Based Companies Semiconductor Process-Exposed Parts Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Semiconductor Process-Exposed Parts Revenue Market Share (2021-2026)
Table 26. Rest of World Based Semiconductor Process-Exposed Parts Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Semiconductor Process-Exposed Parts Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Semiconductor Process-Exposed Parts Revenue Market Share (2021-2026)
Table 29. World Semiconductor Process-Exposed Parts Market Size by Primary Material, (USD Million), 2021 & 2025 & 2032
Table 30. World Semiconductor Process-Exposed Parts Market Size Value by Primary Material (2021-2026) & (USD Million)
Table 31. World Semiconductor Process-Exposed Parts Market Size by Primary Material (2027-2032) & (USD Million)
Table 32. World Semiconductor Process-Exposed Parts Market Size by Customer Type, (USD Million), 2021 & 2025 & 2032
Table 33. World Semiconductor Process-Exposed Parts Market Size Value by Customer Type (2021-2026) & (USD Million)
Table 34. World Semiconductor Process-Exposed Parts Market Size by Customer Type (2027-2032) & (USD Million)
Table 35. World Semiconductor Process-Exposed Parts Market Size by Part Lifecycle, (USD Million), 2021 & 2025 & 2032
Table 36. World Semiconductor Process-Exposed Parts Market Size Value by Part Lifecycle (2021-2026) & (USD Million)
Table 37. World Semiconductor Process-Exposed Parts Market Size by Part Lifecycle (2027-2032) & (USD Million)
Table 38. World Semiconductor Process-Exposed Parts Market Size by Process Step, (USD Million), 2021 & 2025 & 2032
Table 39. World Semiconductor Process-Exposed Parts Market Size by Process Step (2021-2026) & (USD Million)

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Table 40. World Semiconductor Process-Exposed Parts Market Size by Process Step (2027-2032) & (USD Million)
Table 41. Lam Research (Silfex) Basic Information, Manufacturing Base and Competitors
Table 42. Lam Research (Silfex) Major Business
Table 43. Lam Research (Silfex) Semiconductor Process-Exposed Parts Product and Services
Table 44. Lam Research (Silfex) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Lam Research (Silfex) Recent Developments/Updates
Table 46. Lam Research (Silfex) Competitive Strengths & Weaknesses
Table 47. Entegris, Inc. Basic Information, Manufacturing Base and Competitors
Table 48. Entegris, Inc. Major Business
Table 49. Entegris, Inc. Semiconductor Process-Exposed Parts Product and Services
Table 50. Entegris, Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Entegris, Inc. Recent Developments/Updates
Table 52. Entegris, Inc. Competitive Strengths & Weaknesses
Table 53. CoorsTek, Inc. Basic Information, Manufacturing Base and Competitors
Table 54. CoorsTek, Inc. Major Business
Table 55. CoorsTek, Inc. Semiconductor Process-Exposed Parts Product and Services
Table 56. CoorsTek, Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. CoorsTek, Inc. Recent Developments/Updates
Table 58. CoorsTek, Inc. Competitive Strengths & Weaknesses
Table 59. Ferrotec Holdings Corporation Basic Information, Manufacturing Base and Competitors
Table 60. Ferrotec Holdings Corporation Major Business
Table 61. Ferrotec Holdings Corporation Semiconductor Process-Exposed Parts Product and Services
Table 62. Ferrotec Holdings Corporation Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Ferrotec Holdings Corporation Recent Developments/Updates
Table 64. Ferrotec Holdings Corporation Competitive Strengths & Weaknesses
Table 65. Schunk Xycarb Technology Basic Information, Manufacturing Base and Competitors
Table 66. Schunk Xycarb Technology Major Business
Table 67. Schunk Xycarb Technology Semiconductor Process-Exposed Parts Product and Services

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Table 68. Schunk Xycarb Technology Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Schunk Xycarb Technology Recent Developments/Updates
Table 70. Schunk Xycarb Technology Competitive Strengths & Weaknesses
Table 71. WONIK QnC Corporation Basic Information, Manufacturing Base and Competitors
Table 72. WONIK QnC Corporation Major Business
Table 73. WONIK QnC Corporation Semiconductor Process-Exposed Parts Product and Services
Table 74. WONIK QnC Corporation Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. WONIK QnC Corporation Recent Developments/Updates
Table 76. WONIK QnC Corporation Competitive Strengths & Weaknesses
Table 77. Tokai Carbon Co., Ltd Basic Information, Manufacturing Base and Competitors
Table 78. Tokai Carbon Co., Ltd Major Business
Table 79. Tokai Carbon Co., Ltd Semiconductor Process-Exposed Parts Product and Services
Table 80. Tokai Carbon Co., Ltd Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Tokai Carbon Co., Ltd Recent Developments/Updates
Table 82. Tokai Carbon Co., Ltd Competitive Strengths & Weaknesses
Table 83. Heraeus Covantics Basic Information, Manufacturing Base and Competitors
Table 84. Heraeus Covantics Major Business
Table 85. Heraeus Covantics Semiconductor Process-Exposed Parts Product and Services
Table 86. Heraeus Covantics Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Heraeus Covantics Recent Developments/Updates
Table 88. Heraeus Covantics Competitive Strengths & Weaknesses
Table 89. Tosoh Corporation (Tosoh Quartz) Basic Information, Manufacturing Base and Competitors
Table 90. Tosoh Corporation (Tosoh Quartz) Major Business
Table 91. Tosoh Corporation (Tosoh Quartz) Semiconductor Process-Exposed Parts Product and Services
Table 92. Tosoh Corporation (Tosoh Quartz) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Tosoh Corporation (Tosoh Quartz) Recent Developments/Updates
Table 94. Tosoh Corporation (Tosoh Quartz) Competitive Strengths & Weaknesses

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Table 95. SGL Carbon SE Basic Information, Manufacturing Base and Competitors
Table 96. SGL Carbon SE Major Business
Table 97. SGL Carbon SE Semiconductor Process-Exposed Parts Product and Services
Table 98. SGL Carbon SE Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. SGL Carbon SE Recent Developments/Updates
Table 100. SGL Carbon SE Competitive Strengths & Weaknesses
Table 101. Mersen S.A. Basic Information, Manufacturing Base and Competitors
Table 102. Mersen S.A. Major Business
Table 103. Mersen S.A. Semiconductor Process-Exposed Parts Product and Services
Table 104. Mersen S.A. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Mersen S.A. Recent Developments/Updates
Table 106. Mersen S.A. Competitive Strengths & Weaknesses
Table 107. HANA Materials Inc. Basic Information, Manufacturing Base and Competitors
Table 108. HANA Materials Inc. Major Business
Table 109. HANA Materials Inc. Semiconductor Process-Exposed Parts Product and Services
Table 110. HANA Materials Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. HANA Materials Inc. Recent Developments/Updates
Table 112. HANA Materials Inc. Competitive Strengths & Weaknesses
Table 113. Worldex Industry & Trading Basic Information, Manufacturing Base and Competitors
Table 114. Worldex Industry & Trading Major Business
Table 115. Worldex Industry & Trading Semiconductor Process-Exposed Parts Product and Services
Table 116. Worldex Industry & Trading Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. Worldex Industry & Trading Recent Developments/Updates
Table 118. Worldex Industry & Trading Competitive Strengths & Weaknesses
Table 119. KYOCERA Corporation Basic Information, Manufacturing Base and Competitors
Table 120. KYOCERA Corporation Major Business
Table 121. KYOCERA Corporation Semiconductor Process-Exposed Parts Product and Services
Table 122. KYOCERA Corporation Semiconductor Process-Exposed Parts Revenue,

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Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. KYOCERA Corporation Recent Developments/Updates
Table 124. KYOCERA Corporation Competitive Strengths & Weaknesses
Table 125. Momentive Technologies Basic Information, Manufacturing Base and Competitors
Table 126. Momentive Technologies Major Business
Table 127. Momentive Technologies Semiconductor Process-Exposed Parts Product and Services
Table 128. Momentive Technologies Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. Momentive Technologies Recent Developments/Updates
Table 130. Momentive Technologies Competitive Strengths & Weaknesses
Table 131. Morgan Advanced Materials plc Basic Information, Manufacturing Base and Competitors
Table 132. Morgan Advanced Materials plc Major Business
Table 133. Morgan Advanced Materials plc Semiconductor Process-Exposed Parts Product and Services
Table 134. Morgan Advanced Materials plc Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 135. Morgan Advanced Materials plc Recent Developments/Updates
Table 136. Morgan Advanced Materials plc Competitive Strengths & Weaknesses
Table 137. CeramTec GmbH Basic Information, Manufacturing Base and Competitors
Table 138. CeramTec GmbH Major Business
Table 139. CeramTec GmbH Semiconductor Process-Exposed Parts Product and Services
Table 140. CeramTec GmbH Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. CeramTec GmbH Recent Developments/Updates
Table 142. CeramTec GmbH Competitive Strengths & Weaknesses
Table 143. TOTO Advanced Ceramics Basic Information, Manufacturing Base and Competitors
Table 144. TOTO Advanced Ceramics Major Business
Table 145. TOTO Advanced Ceramics Semiconductor Process-Exposed Parts Product and Services
Table 146. TOTO Advanced Ceramics Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. TOTO Advanced Ceramics Recent Developments/Updates
Table 148. TOTO Advanced Ceramics Competitive Strengths & Weaknesses
Table 149. UCT (Ultra Clean Holdings, Inc) Basic Information, Manufacturing Base and

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Competitors
Table 150. UCT (Ultra Clean Holdings, Inc) Major Business
Table 151. UCT (Ultra Clean Holdings, Inc) Semiconductor Process-Exposed Parts Product and Services
Table 152. UCT (Ultra Clean Holdings, Inc) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. UCT (Ultra Clean Holdings, Inc) Recent Developments/Updates
Table 154. UCT (Ultra Clean Holdings, Inc) Competitive Strengths & Weaknesses
Table 155. Kurita (Pentagon Technologies) Basic Information, Manufacturing Base and Competitors
Table 156. Kurita (Pentagon Technologies) Major Business
Table 157. Kurita (Pentagon Technologies) Semiconductor Process-Exposed Parts Product and Services
Table 158. Kurita (Pentagon Technologies) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 159. Kurita (Pentagon Technologies) Recent Developments/Updates
Table 160. Kurita (Pentagon Technologies) Competitive Strengths & Weaknesses
Table 161. Enpro Industries (LeanTeq and NxEdge) Basic Information, Manufacturing Base and Competitors
Table 162. Enpro Industries (LeanTeq and NxEdge) Major Business
Table 163. Enpro Industries (LeanTeq and NxEdge) Semiconductor Process-Exposed Parts Product and Services
Table 164. Enpro Industries (LeanTeq and NxEdge) Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 165. Enpro Industries (LeanTeq and NxEdge) Recent Developments/Updates
Table 166. Enpro Industries (LeanTeq and NxEdge) Competitive Strengths & Weaknesses
Table 167. TOCALO Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 168. TOCALO Co., Ltd. Major Business
Table 169. TOCALO Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 170. TOCALO Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 171. TOCALO Co., Ltd. Recent Developments/Updates
Table 172. TOCALO Co., Ltd. Competitive Strengths & Weaknesses
Table 173. KoMiCo Basic Information, Manufacturing Base and Competitors
Table 174. KoMiCo Major Business
Table 175. KoMiCo Semiconductor Process-Exposed Parts Product and Services
Table 176. KoMiCo Semiconductor Process-Exposed Parts Revenue, Gross Margin

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and Market Share (2021-2026) & (USD Million)
Table 177. KoMiCo Recent Developments/Updates
Table 178. KoMiCo Competitive Strengths & Weaknesses
Table 179. Cinos Basic Information, Manufacturing Base and Competitors
Table 180. Cinos Major Business
Table 181. Cinos Semiconductor Process-Exposed Parts Product and Services
Table 182. Cinos Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 183. Cinos Recent Developments/Updates
Table 184. Cinos Competitive Strengths & Weaknesses
Table 185. Hansol IONES Basic Information, Manufacturing Base and Competitors
Table 186. Hansol IONES Major Business
Table 187. Hansol IONES Semiconductor Process-Exposed Parts Product and Services
Table 188. Hansol IONES Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 189. Hansol IONES Recent Developments/Updates
Table 190. Hansol IONES Competitive Strengths & Weaknesses
Table 191. WONIK QnC Basic Information, Manufacturing Base and Competitors
Table 192. WONIK QnC Major Business
Table 193. WONIK QnC Semiconductor Process-Exposed Parts Product and Services
Table 194. WONIK QnC Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 195. WONIK QnC Recent Developments/Updates
Table 196. WONIK QnC Competitive Strengths & Weaknesses
Table 197. Toyo Tanso Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 198. Toyo Tanso Co., Ltd. Major Business
Table 199. Toyo Tanso Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 200. Toyo Tanso Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 201. Toyo Tanso Co., Ltd. Recent Developments/Updates
Table 202. Toyo Tanso Co., Ltd. Competitive Strengths & Weaknesses
Table 203. BCnC Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 204. BCnC Co., Ltd. Major Business
Table 205. BCnC Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 206. BCnC Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

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Table 207. BCnC Co., Ltd. Recent Developments/Updates
Table 208. BCnC Co., Ltd. Competitive Strengths & Weaknesses
Table 209. MiCo Ceramics Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 210. MiCo Ceramics Co., Ltd. Major Business
Table 211. MiCo Ceramics Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 212. MiCo Ceramics Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 213. MiCo Ceramics Co., Ltd. Recent Developments/Updates
Table 214. MiCo Ceramics Co., Ltd. Competitive Strengths & Weaknesses
Table 215. Mitsubishi Materials Basic Information, Manufacturing Base and Competitors
Table 216. Mitsubishi Materials Major Business
Table 217. Mitsubishi Materials Semiconductor Process-Exposed Parts Product and Services
Table 218. Mitsubishi Materials Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 219. Mitsubishi Materials Recent Developments/Updates
Table 220. Mitsubishi Materials Competitive Strengths & Weaknesses
Table 221. CMTX Inc. Basic Information, Manufacturing Base and Competitors
Table 222. CMTX Inc. Major Business
Table 223. CMTX Inc. Semiconductor Process-Exposed Parts Product and Services
Table 224. CMTX Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 225. CMTX Inc. Recent Developments/Updates
Table 226. CMTX Inc. Competitive Strengths & Weaknesses
Table 227. MARUWA CO., LTD. Basic Information, Manufacturing Base and Competitors
Table 228. MARUWA CO., LTD. Major Business
Table 229. MARUWA CO., LTD. Semiconductor Process-Exposed Parts Product and Services
Table 230. MARUWA CO., LTD. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 231. MARUWA CO., LTD. Recent Developments/Updates
Table 232. MARUWA CO., LTD. Competitive Strengths & Weaknesses
Table 233. Shin-Etsu Quartz Products Basic Information, Manufacturing Base and Competitors
Table 234. Shin-Etsu Quartz Products Major Business
Table 235. Shin-Etsu Quartz Products Semiconductor Process-Exposed Parts Product

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and Services
Table 236. Shin-Etsu Quartz Products Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 237. Shin-Etsu Quartz Products Recent Developments/Updates
Table 238. Shin-Etsu Quartz Products Competitive Strengths & Weaknesses
Table 239. Techno Quartz Inc. Basic Information, Manufacturing Base and Competitors
Table 240. Techno Quartz Inc. Major Business
Table 241. Techno Quartz Inc. Semiconductor Process-Exposed Parts Product and Services
Table 242. Techno Quartz Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 243. Techno Quartz Inc. Recent Developments/Updates
Table 244. Techno Quartz Inc. Competitive Strengths & Weaknesses
Table 245. ASUZAC Inc. Basic Information, Manufacturing Base and Competitors
Table 246. ASUZAC Inc. Major Business
Table 247. ASUZAC Inc. Semiconductor Process-Exposed Parts Product and Services
Table 248. ASUZAC Inc. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 249. ASUZAC Inc. Recent Developments/Updates
Table 250. ASUZAC Inc. Competitive Strengths & Weaknesses
Table 251. Nippon Techno-Carbon Basic Information, Manufacturing Base and Competitors
Table 252. Nippon Techno-Carbon Major Business
Table 253. Nippon Techno-Carbon Semiconductor Process-Exposed Parts Product and Services
Table 254. Nippon Techno-Carbon Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 255. Nippon Techno-Carbon Recent Developments/Updates
Table 256. Nippon Techno-Carbon Competitive Strengths & Weaknesses
Table 257. JFM Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 258. JFM Co., Ltd. Major Business
Table 259. JFM Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 260. JFM Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 261. JFM Co., Ltd. Recent Developments/Updates
Table 262. JFM Co., Ltd. Competitive Strengths & Weaknesses
Table 263. NISHIMURA ADVANCED CERAMICS Basic Information, Manufacturing Base and Competitors
Table 264. NISHIMURA ADVANCED CERAMICS Major Business

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Table 265. NISHIMURA ADVANCED CERAMICS Semiconductor Process-Exposed Parts Product and Services
Table 266. NISHIMURA ADVANCED CERAMICS Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 267. NISHIMURA ADVANCED CERAMICS Recent Developments/Updates
Table 268. NISHIMURA ADVANCED CERAMICS Competitive Strengths & Weaknesses
Table 269. Niterra Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 270. Niterra Co., Ltd. Major Business
Table 271. Niterra Co., Ltd. Semiconductor Process-Exposed Parts Product and Services
Table 272. Niterra Co., Ltd. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 273. Niterra Co., Ltd. Recent Developments/Updates
Table 274. Niterra Co., Ltd. Competitive Strengths & Weaknesses
Table 275. NGK INSULATORS, LTD. Basic Information, Manufacturing Base and Competitors
Table 276. NGK INSULATORS, LTD. Major Business
Table 277. NGK INSULATORS, LTD. Semiconductor Process-Exposed Parts Product and Services
Table 278. NGK INSULATORS, LTD. Semiconductor Process-Exposed Parts Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 279. NGK INSULATORS, LTD. Recent Developments/Updates
Table 280. NGK INSULATORS, LTD. Competitive Strengths & Weaknesses
Table 281. Global Key Players of Semiconductor Process-Exposed Parts Upstream (Raw Materials)
Table 282. Global Semiconductor Process-Exposed Parts Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor Process-Exposed Parts Picture
Figure 2. World Semiconductor Process-Exposed Parts Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Semiconductor Process-Exposed Parts Total Revenue (2021-2032) & (USD Million)
Figure 4. World Semiconductor Process-Exposed Parts Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Semiconductor Process-Exposed Parts Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Semiconductor Process-Exposed Parts Revenue (2021-2032) & (USD Million)
Figure 13. Semiconductor Process-Exposed Parts Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 16. World Semiconductor Process-Exposed Parts Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 18. China Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 23. India Semiconductor Process-Exposed Parts Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Semiconductor Process-Exposed Parts by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Semiconductor Process-Exposed Parts Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Semiconductor Process-Exposed Parts Markets in 2025
Figure 27. United States VS China: Semiconductor Process-Exposed Parts Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Semiconductor Process-Exposed Parts Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Semiconductor Process-Exposed Parts Market Size by Primary Material, (USD Million), 2021 & 2025 & 2032
Figure 30. World Semiconductor Process-Exposed Parts Market Size Market Share by Primary Material in 2025
Figure 31. Silicon Parts
Figure 32. Quartz Parts
Figure 33. Silicon Carbide Parts
Figure 34. Advanced Ceramic Parts
Figure 35. Graphite & Coated Graphite Parts
Figure 36. Plasma-facing Metal Process Kits
Figure 37. World Semiconductor Process-Exposed Parts Market Size Market Share by Primary Material (2021-2032)
Figure 38. World Semiconductor Process-Exposed Parts Market Size by Customer Type, (USD Million), 2021 & 2025 & 2032
Figure 39. World Semiconductor Process-Exposed Parts Market Size Market Share by Customer Type in 2025
Figure 40. Equipment OEMs
Figure 41. IDMs and Foundries
Figure 42. Memory Manufacturers
Figure 43. Specialty / Compound Semiconductor Fabs
Figure 44. World Semiconductor Process-Exposed Parts Market Size Market Share by

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Customer Type (2021-2032)
Figure 45. World Semiconductor Process-Exposed Parts Market Size by Part Lifecycle, (USD Million), 2021 & 2025 & 2032
Figure 46. World Semiconductor Process-Exposed Parts Market Size Market Share by Part Lifecycle in 2025
Figure 47. New OEM Parts
Figure 48. New Replacement Parts
Figure 49. Refurbished / Reconditioned Parts
Figure 50. World Semiconductor Process-Exposed Parts Market Size Market Share by Part Lifecycle (2021-2032)
Figure 51. World Semiconductor Process-Exposed Parts Market Size by Process Step, (USD Million), 2021 & 2025 & 2032
Figure 52. World Semiconductor Process-Exposed Parts Market Size Market Share by Process Step in 2025
Figure 53. Etch & Ashing
Figure 54. CVD / ALD / Epitaxy
Figure 55. PVD
Figure 56. Diffusion / Oxidation / Anneal
Figure 57. Ion Implant
Figure 58. Wet / Cleaning Process Chambers
Figure 59. Other Front-end Processes
Figure 60. World Semiconductor Process-Exposed Parts Market Size Market Share by Process Step (2021-2032)
Figure 61. Semiconductor Process-Exposed Parts Industrial Chain
Figure 62. Methodology
Figure 63. Research Process and Data Source

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