

Global Silicon Electrodes for Etching Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Silicon Electrodes for Etching market size is expected to reach \$ 2536 million by 2032, rising at a market growth of 10.8% CAGR during the forecast period (2026-2032).

Silicon electrodes, also called silicon showerheads, are mainly used in 8-12 inches (i.e. 200mm-300mm) plasma etching machines. In the integrated circuit manufacturing process, high-purity silicon components and wafers are made of silicon material, which makes the electrical properties of etching more uniform, so silicon component products are widely used in semiconductor etching machines.

In Etching Process, Electrode is used to control the gas flow to create the plasma efficiently.

By product type, silicon electrodes can be segmented by structural form, material property, wafer size and target etch chamber. By structural form, they include flat silicon electrodes, curved upper silicon electrodes, showerhead-type silicon electrodes, gas-distribution-plate silicon electrodes and customized multi-hole silicon electrodes. By material property, they include single-crystal silicon electrodes, polycrystalline silicon electrodes and customized electrodes controlled by low/mid/high resistivity, crystal orientation and doping requirements. By wafer size, they cover 6-inch, 8-inch and 12-inch etch tools, with 12-inch products representing the main growth segment for advanced logic, advanced memory and mainstream 300 mm wafer fabs. By application chamber, silicon electrodes are used in dielectric etch, conductor etch, deep silicon etch, high-aspect-ratio memory etch, fine-pattern advanced logic etch and certain front-end-related etch steps in advanced packaging. Their manufacturing technology is not limited to CNC machining; it requires integrated capability in high-purity silicon

materials, crystal growth/slicing, precision hole drilling, low-damage lapping and polishing, ultrasonic/laser/precision drilling, ultra-clean cleaning, dimensional inspection, particle control and customer chamber qualification. As GAA logic, 3D NAND, HBM-related DRAM, TSV and advanced packaging structures increase the requirements for etch aspect ratio and plasma uniformity, silicon electrodes will continue to move toward larger sizes, more complex gas-hole arrays, lower particle generation, longer service life, more stable resistivity and stronger chamber-specific customization. Lam notes that every wafer undergoes many etching steps before circuits are formed and connected, and that etching is critical for complex AI-era chip structures, which supports the rising demand intensity for silicon electrodes as key etch-chamber consumables.

From an industry-policy and competitive-landscape perspective, silicon electrodes are usually not listed as a standalone policy category, but they fall within the practical scope of semiconductor equipment parts, etch-chamber consumables and high-purity silicon deep-processing products. They are therefore affected by IC equipment and materials policies, import-tax policies, R&D tax incentives, regional supply-chain security strategies and U.S. trade actions. CHIPS for America provides about US\$50 billion to strengthen U.S. semiconductor R&D and manufacturing, the European Chips Act aims to reinforce the EU semiconductor ecosystem and supply-chain resilience while reducing external dependencies, and China's 15% super input VAT credit for qualifying IC equipment and materials enterprises supports domestic semiconductor supply-chain investment. Together, these policies are pushing silicon electrode supply chains toward localization, regionalization, dual-source qualification and critical-consumable security. The competitive landscape remains concentrated: Silfex benefits from its Lam Research ecosystem and U.S. manufacturing base, while Hana Materials, Worldex, CMTX, CoorsTek, KC Parts Tech, TKG Solmics, Mitsubishi Materials, RS Technologies and Chinese suppliers such as DSTC, Thinkon and Genori form the main competitive group. The key competitive factors are not only capacity scale, but also etch OEM qualification, wafer-fab validation history, batch consistency, gas-hole machining capability, clean-control capability, delivery responsiveness and IP/drawing confidentiality.

In terms of market status, trends and growth drivers, the global silicon electrode market is benefiting from AI/HPC, data centers, HBM, DRAM, 3D NAND, advanced logic, advanced packaging and 300 mm fab investment, entering a compound growth phase driven by replacement demand from the installed etch-tool base, incremental demand from new etch equipment shipments and ASP uplift from high-end electrodes. Silicon electrode demand should not be modeled solely by wafer shipments; it should be assessed through etch-tool installed base, fab utilization, etch-step intensity, consumable replacement cycles, advanced-node mix and customer qualification

progress. SEMI expects worldwide 300 mm fab equipment spending to increase 18% to US\$133 billion in 2026 and 14% to US\$151 billion in 2027, driven by AI chips for data centers and edge devices, semiconductor self-sufficiency and regionalized supply-chain restructuring. Lam also emphasizes that complex AI-era structures make etching increasingly critical in semiconductor manufacturing. Looking forward, the main trends for silicon electrodes include a rising share of 12-inch products, broader use of single-crystal and high-purity low-contamination silicon materials, more stringent control of gas-hole arrays and surface conditions, continued OEM-channel dominance with rising wafer-fab direct procurement and second-source qualification, faster local supply-chain expansion in China, Korea and Japan, and further regionalization of the global market under trade-policy and supply-chain-security pressures.

This report studies the global Silicon Electrodes for Etching production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Silicon Electrodes for Etching 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 Silicon Electrodes for Etching that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Silicon Electrodes for Etching total production and demand, 2021-2032, (K Pcs)

Global Silicon Electrodes for Etching total production value, 2021-2032, (USD Million)

Global Silicon Electrodes for Etching production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Silicon Electrodes for Etching consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Silicon Electrodes for Etching domestic production, consumption, key domestic manufacturers and share

Global Silicon Electrodes for Etching production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Silicon Electrodes for Etching production by Size, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Silicon Electrodes for Etching production by Customer Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Silicon Electrodes for Etching market based

on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Silfex Inc., Hana Materials Inc., Worldex Industry & Trading Co., Ltd., Mitsubishi Materials, CoorsTek, SiFusion, KC Parts Tech., Ltd., RS Technologies Co., Ltd., ThinkonSemi (Fujian Dynafine), Techno Quartz Inc., 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 Silicon Electrodes for Etching market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pc) by manufacturer, by Size, and by Customer Type. 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 Silicon Electrodes for Etching Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Silicon Electrodes for Etching Market, Segmentation by Size:

12 Inch Si Electrode

8 Inch Si Electrode

Global Silicon Electrodes for Etching Market, Segmentation by Etcher Type:

CCP/RIE Etcher

ICP/TCP Etcher

Others

Global Silicon Electrodes for Etching Market, Segmentation by Chip Type:

Logic/Foundry

Memory

Others

Global Silicon Electrodes for Etching Market, Segmentation by Customer Type:

OEM

Wafer FAB

Companies Profiled:

Silfex Inc.

Hana Materials Inc.

Worldex Industry & Trading Co., Ltd.

Mitsubishi Materials

CoorsTek

SiFusion

KC Parts Tech., Ltd.

RS Technologies Co., Ltd.

ThinkonSemi (Fujian Dynafine)

Techno Quartz Inc.

Chongqing Genori Technology Co., Ltd

Ruijiexinsheng Electronic Technology (WuXi) Co., Ltd

One Semicon Co.,Ltd

CMTX Co.,Ltd

BCnC Co., LTD.

K-max

DS Techno

Ronda Semiconductor

SICREAT(Suzhou) Semitech Co.,Ltd.

TKG Solmics

KFMI

Beijing YESEMI

Wuxi Naskai Semiconductor Technology

Yangzhou Lattice Semiconductor

Chongqing Xinhui Material Technology

Alchemist

Wuhu Tongchao Precision Machinery

Anhui Sixiang Semiconductor Materials Technology

Zhejiang Yuanxin Semiconductor Materials

Forcera Materials

Key Questions Answered:

1. How big is the global Silicon Electrodes for Etching market?
2. What is the demand of the global Silicon Electrodes for Etching market?
3. What is the year over year growth of the global Silicon Electrodes for Etching market?
4. What is the production and production value of the global Silicon Electrodes for Etching market?
5. Who are the key producers in the global Silicon Electrodes for Etching market?
6. What are the growth factors driving the market demand?

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