

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G0CDBF2DC20CEN.html>

Date: August 2026

Pages: 102

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

ID: G0CDBF2DC20CEN

Abstracts

According to our (Global Info Research) latest study, the global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market size was valued at US\$ 276 million in 2025 and is forecast to a readjusted size of US\$ 494 million by 2032 with a CAGR of 8.7% during review period.

Silicon feedstock for liquid silicon infiltration (LSI) refers to specialty silicon materials used in the manufacturing of reaction bonded silicon carbide, siliconized silicon carbide, and related high temperature composite materials. Major product forms include high purity silicon lumps, silicon granules, silicon powders, customized particle size silicon feedstock, and low oxygen low impurity silicon materials. These materials are typically manufactured through industrial silicon smelting, controlled crushing, particle classification, impurity control, and purification processes, with purity levels generally ranging from 98.5% to 99.999%. Key specifications focus on controlling iron, aluminum, calcium, oxygen, and particle size distribution stability to ensure wettability, melt flow behavior, reaction uniformity, and densification performance during liquid silicon infiltration processing. The products are primarily used in RBSiC, SiSiC, semiconductor equipment silicon carbide components, thermal field materials, mechanical seals, high temperature ceramics, and aerospace composite materials. In 2025, the global average selling price of Liquid Silicon Infiltration Silicon Feedstock is estimated at approximately USD 5,000 to USD 12,000 per metric ton, with mainstream products mainly concentrated in the USD 6,000 to USD 9,000 per metric ton range. Average industry gross margin is estimated at approximately 18% to 28%, while high purity silicon powder products may reach around 32% gross margin with relatively limited market share, resulting in an overall industry average gross margin of approximately 22% to 26%.

Silicon Feedstock for Liquid Silicon Infiltration represents a specialized segment within the broader high purity silicon and advanced ceramic materials industry. The upstream supply chain primarily involves silicon metal smelting, high purity silicon refining, and specialty silicon powder processing, while the midstream focuses on customized infiltration grade silicon preparation and particle engineering. Downstream demand is mainly driven by RBSiC, SiSiC, semiconductor equipment silicon carbide components, thermal field structures, high temperature sealing systems, and aerospace composite materials. In recent years, the rapid expansion of semiconductor equipment localization, advanced ceramic manufacturing, and high temperature structural materials has significantly increased the importance of liquid silicon infiltration technologies, resulting in rising demand for infiltration grade silicon feedstock. Compared with conventional industrial silicon markets, this sector remains relatively small in volume but demonstrates substantially higher technical barriers, qualification requirements, and value added characteristics. The current global supply structure remains concentrated in Europe, China, and selected North American high purity silicon suppliers. European manufacturers maintain strong capabilities in impurity control, low oxygen silicon processing, and high end infiltration material systems, while Chinese suppliers are increasingly leveraging advantages in industrial silicon capacity, energy costs, and domestic semiconductor supply chain development to expand into specialty infiltration materials. Regional supply chain restructuring has become increasingly visible, particularly as semiconductor equipment and advanced ceramic manufacturers seek localized and more resilient sourcing systems to reduce international supply chain risks. At the same time, industry investment activity continues to focus on high purity silicon powder expansion, ultra fine particle silicon processing, and customized material engineering, supporting the gradual transition toward higher performance infiltration systems. From a technology and product evolution perspective, the industry is moving away from conventional metallurgical grade silicon toward higher purity, lower oxygen content, tighter particle distribution control, and application specific material customization. Future growth is expected to be increasingly supported by semiconductor equipment, third generation semiconductor manufacturing, advanced thermal field materials, and aerospace grade composite applications rather than traditional mechanical industries. Due to the stringent requirements for impurity management, infiltration consistency, and process stability, supplier qualification cycles remain relatively long, preserving the competitive position of established suppliers in the near term. However, the number of regional specialty processors and internally integrated material preparation systems is steadily increasing, strengthening the long tail characteristics of the industry. Future competition is expected to shift from simple purity competition toward integrated process compatibility, particle engineering

capability, and collaborative application development with advanced manufacturing customers.

This report is a detailed and comprehensive analysis for global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Silicon Feedstock for Liquid Silicon Infiltration (LSI)

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 Silicon Feedstock for Liquid Silicon Infiltration (LSI) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Elkem ASA, Ferroglobe PLC, REC Silicon ASA, Wacker Chemie AG, PCC BakkiSilicon ehf, Hoshine Silicon Industry Co., Ltd., Tongwei Co., Ltd., Daqo New Energy Corp., etc.

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

Market Segmentation

Silicon Feedstock for Liquid Silicon Infiltration (LSI) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Silicon Lump

Silicon Granule

Silicon Powder

Others

Market segment by Purity

Standard Metallurgical Silicon (98.5%?99.0%)

Refined Industrial Silicon (99.0%?99.5%)

High Purity Infiltration Silicon (99.5%?99.9%)

Specialty Low-impurity Silicon (>99.9%)

Others

Market segment by Particle Size Range

Coarse Silicon Material (>1 mm)

Medium Particle Silicon (100 µm-1 mm)

Fine Silicon Powder (10-100 µm)

Ultra-fine Silicon Powder (<10 µm)

Others

Market segment by Technology

Reactive Melt Infiltration (RMI)

Gaseous Silicon Infiltration (GSI)

Reactive Sintering

Others

Market segment by Application

Semiconductor Industry

Industrial Manufacturing

Energy and Thermal Processing

Aerospace and Defense

Automotive Industry

Others

Major players covered

Elkem ASA

Ferroglobe PLC

REC Silicon ASA

Wacker Chemie AG

PCC BakkiSilicon ehf

Hoshine Silicon Industry Co., Ltd.

Tongwei Co., Ltd.

Daqo New Energy Corp.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Global Silicon Feedstock for Liquid Silicon Infiltration (LSI) Market 2026 by Manufacturers, Regions, Type and...

Chapter 1, to describe Silicon Feedstock for Liquid Silicon Infiltration (LSI) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Silicon Feedstock for Liquid Silicon Infiltration (LSI), with price, sales quantity, revenue, and global market share of Silicon Feedstock for Liquid Silicon Infiltration (LSI) from 2021 to 2026.

Chapter 3, the Silicon Feedstock for Liquid Silicon Infiltration (LSI) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Silicon Feedstock for Liquid Silicon Infiltration (LSI) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Silicon Feedstock for Liquid Silicon Infiltration (LSI) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Silicon Feedstock for Liquid Silicon Infiltration (LSI).

Chapter 14 and 15, to describe Silicon Feedstock for Liquid Silicon Infiltration (LSI) sales channel, distributors, customers, research findings and conclusion.

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