

Global Thermal Spray Coatings for Semiconductor Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermal Spray Coatings for Semiconductor Equipment market size is expected to reach \$ 986 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

Manufacturing silicon wafers and semiconductors require a harsh environment. This abrasive environment dramatically shortens the life of chamber components used to house the process, threatening the quality of the highly sensitive products. This report studies the coating service for semiconductor equipment parts, like chambers, showerhead (GDP), electrostatic chuck (ESC), liners, baffle, shield cover, heater, shutter, focus ring, edge ring, ceramic window, etch gas injector, etc.

North American market for thermal spray coatings for semiconductor equipment is estimated to increase from \$ 220.58 million in 2024 to reach \$ 326.14 million by 2031, at a CAGR of 6.07% during the forecast period of 2025 through 2031.

Asia-Pacific market for thermal spray coatings for semiconductor equipment is estimated to increase from \$ 407.53 million in 2024 to reach \$ 674.74 million by 2031, at a CAGR of 7.86% during the forecast period of 2025 through 2031.

Europe market for thermal spray coatings for semiconductor equipment is estimated to increase from \$ 66.62 million in 2024 to reach \$ 91.83 million by 2031, at a CAGR of 5.32% during the forecast period of 2025 through 2031.

In terms of coating materials, ceramic coating is dominating the market, with a share about 69.39%. And in terms coating technology, plasma spray coating in the largest segment, holds 72.48 percent in 2024, and will reach 74.68% in 2031. In next few years, the PVD, CVD & ALD Coating technology will grow faster.

Currently etching is the largest application, has a share about 45.18%, followed by thin film (CVD, PVD, ALD), and Ion Implant.

The key players of coating service are mainly located in the USA, Germany, Japan,

South Korea, China Taiwan, Singapore, and China Mainland. The global top five players hold a share about 58.52%, while top 10 players occupied over 72.73 percent. The global PVD, CVD and ALD coating method market is dominated by companies from USA, Japan, South Korea, and Europe. Key companies of PVD, CVD and ALD coating method include KoMiCo, Cinos, TOCALO, WONIK QnC, Beneq, Entegris, Inficon and Oerlikon Balzers. Top five players occupy for over 74% market share in 2024.

In the North America market, the key players are UCT (Quantum Clean), Pentagon Technologies, Enpro Industries (NxEdge), Mitsubishi Chemical (Cleanpart), KoMiCo (USA division), FM Industries, Oerlikon Balzers, Beneq, APS Materials, Inc., Entegris, and SilcoTek, etc. In 2024, the North America top five players had a share approximately 65% in terms of revenue.

In the China Taiwan market, the key players are UCT (Ultra Clean Holdings, Inc), Enpro Industries, TOCALO Co., Ltd., Mitsubishi Chemical (Cleanpart), KoMiCo, KERTZ HIGH TECH, Hung Jie Technology Corporation, and HTCSolar, etc.

In Japan, the key player is TOCALO Co., Ltd., etc.

In South Korea, the key players are KoMiCo, UCT (Ultra Clean Holdings, Inc), Cinos, Hansol IONES, WONIK QnC, DFtech, TOPWINTECH, FEMVIX, SEWON HARDFACING CO., LTD, and Value Engineering Co., Ltd, etc.

In China mainland market, the key players are KoMiCo, Cinos, TOCALO Co., Ltd., DFtech, Jiangsu Kaiweitesi Semiconductor Technology Co., Ltd., HCUT Co., Ltd, Ferrotec (Anhui) Technology Development Co., Ltd, Shanghai Companion, Chongqing Genori Technology Co., Ltd, and GRAND HITEK, etc.

Over the next 3?5 years, coating services for semiconductor fabrication equipment parts should show structural growth tied to both capex momentum and the expanding installed base, with an accelerating upgrade cycle toward higher-end materials and denser process routes. SEMI projects global semiconductor manufacturing equipment sales to rise for three consecutive years and reach about \$156B in 2027, driven primarily by AI-related investments in leading-edge logic and advanced memory (including technology migration and 3D architectures), which implies higher intensity and larger fleets of etch/deposition tools?and therefore a larger recurring need for particle control, contamination risk reduction, and uptime preservation through recoating and surface protection. Technology pathways are likely to stratify: plasma spray remains the volume workhorse, but harsher plasma duty cycles make coating degradation and particle shedding more consequential, strengthening the pull toward denser, cleaner thin-film and hybrid multilayer approaches (PVD/ALD and composite stacks are explicitly positioned to reduce particles, improve process control, and extend component life). In parallel, the materials roadmap continues to broaden from single oxides toward fluorine-containing yttrium systems (fluorides/oxyfluorides) and complex

oxides; YOF/YF? are widely discussed as promising plasma-resistant alternatives to yttria under fluorine-rich chemistries, while upstream suppliers already commercialize granulated thermal-spray powders spanning yttrium oxides, fluorides, oxyfluorides, and complex oxides?helping move material innovation from lab exploration to engineering-scale supply. Overall, the sector?s upside will be increasingly determined by qualification depth and data-backed reliability (particles/trace contamination/lifetime) and by high-purity powder availability plus regionalized service delivery near fab clusters?trends reinforced by SEMI?s outlook that equipment spending growth is broad-based across regions and supported by incentives and regionalization efforts.

This report studies the global Thermal Spray Coatings for Semiconductor Equipment demand, key companies, and key regions.

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

Highlights and key features of the study

Global Thermal Spray Coatings for Semiconductor Equipment total market, 2021-2032, (USD Million)

Global Thermal Spray Coatings for Semiconductor Equipment total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Thermal Spray Coatings for Semiconductor Equipment total market, key domestic companies, and share, (USD Million)

Global Thermal Spray Coatings for Semiconductor Equipment revenue by player, revenue and market share 2021-2026, (USD Million)

Global Thermal Spray Coatings for Semiconductor Equipment total market by Material Type, CAGR, 2021-2032, (USD Million)

Global Thermal Spray Coatings for Semiconductor Equipment total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Thermal Spray Coatings for Semiconductor Equipment 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 TOCALO Co., Ltd., KoMiCo, UCT (Ultra Clean Holdings, Inc), Cinos, Enpro Industries, Pentagon Technologies, Mitsubishi Chemical (Cleanpart), Oerlikon Balzers, Frontken Corporation Berhad, Hansol IONES, 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 Thermal Spray Coatings for Semiconductor Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Material Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Thermal Spray Coatings for Semiconductor Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermal Spray Coatings for Semiconductor Equipment Market, Segmentation by Material Type:

Ceramic Coating

Metal & Alloy Coating

Global Thermal Spray Coatings for Semiconductor Equipment Market, Segmentation by Technology:

Plasma Spray Coating

Arc Spray Coating

PVD, CVD & ALD Coating

Global Thermal Spray Coatings for Semiconductor Equipment Market, Segmentation by Process Node:

High End / Advanced 110nm

Global Thermal Spray Coatings for Semiconductor Equipment Market, Segmentation by Application:

Etching

Thin Film

Diffusion

Ion Implant

Others

Companies Profiled:

TOCALO Co., Ltd.

KoMiCo

UCT (Ultra Clean Holdings, Inc)

Cinos

Enpro Industries

Pentagon Technologies

Mitsubishi Chemical (Cleanpart)

Oerlikon Balzers

Frontken Corporation Berhad

Hansol IONES

Jiangsu Kaiweitesi Semiconductor

FM Industries

KERTZ HIGH TECH

TOPWINTECH

SilcoTek

APS Materials, Inc.

Entegris

Ferrotec (Anhui) Technology Development

DFtech

WONIK QnC

FEMVIX

GRAND HITEK

HCUT Co., Ltd

Shanghai Companion

Hung Jie Technology Corporation

Alumiplate

Value Engineering Co., Ltd

Beneq

Persys Group

HTCSolar

ASSET Solutions, Inc.

Inficon

Vivid Inc.

SEWON HARDFACING

Alcadyne

Chongqing Genori Technology

Key Questions Answered

1. How big is the global Thermal Spray Coatings for Semiconductor Equipment market?
2. What is the demand of the global Thermal Spray Coatings for Semiconductor Equipment market?
3. What is the year over year growth of the global Thermal Spray Coatings for Semiconductor Equipment market?
4. What is the total value of the global Thermal Spray Coatings for Semiconductor Equipment market?
5. Who are the Major Players in the global Thermal Spray Coatings for Semiconductor Equipment market?
6. What are the growth factors driving the market demand?

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