

Global Components for Semiconductor Thermal Processing Equipment Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/GC2333842D11EN.html>

Date: July 2026

Pages: 170

Price: US\$ 3,660.00 (Single User License)

ID: GC2333842D11EN

Abstracts

The global Components for Semiconductor Thermal Processing Equipment market size is predicted to grow from US\$ 1614 million in 2025 to US\$ 2820 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Components/parts for semiconductor thermal processing equipment refer to process-critical engineered parts used in semiconductor wafer fabrication tools for wafer support, process-chamber construction, gas delivery, heating and thermal uniformity, temperature sensing and control, sealing, insulation, and contamination protection. These components are mainly used in diffusion, oxidation, annealing, LPCVD, RTP/RTA, epitaxy, and MOCVD processes. Typical products include quartz process tubes, wafer boats, wafer carriers, injectors, baffles, liners, SiC-coated graphite susceptors, CVD-SiC parts, AlN and alumina ceramic heaters, ceramic support components, thermocouples, pyrometers, infrared temperature sensors, FFKM seals, and high-temperature insulation parts. The core requirements are high purity, low metallic contamination, particle control, dimensional stability at elevated temperatures, thermal-expansion compatibility, thermal uniformity, corrosion resistance, and stable service life, as these components directly affect wafer thermal budget, film uniformity, dopant activation, defect control, and tool uptime.

Components for semiconductor thermal processing equipment represent a multi-material and multi-component supply chain rather than a single product category. Under a narrow and professional scope, the core product families include quartz process tubes, wafer boats, carriers, injectors, SiC-coated graphite susceptors, CVD-SiC parts, ceramic heaters, thermocouples, pyrometers, infrared temperature sensors, high-temperature seals, and insulation parts. The market is driven not only by new thermal

processing tool installations, but also by installed-base replacement demand, periodic consumable change-out, tool refurbishment, and process-specific customization. The technical entry barriers are high because semiconductor thermal components must meet stringent requirements for purity, particle control, dimensional stability, thermal uniformity, corrosion resistance, and long-term repeatability.

From a supply-chain perspective, the global market is segmented by material platform and process function. Quartzware suppliers are distributed across Japan, the United States, South Korea, Europe, and China, while SiC-coated graphite and ultra-pure graphite components are more concentrated among specialized materials groups in Japan, Europe, and North America. Ceramic heaters and advanced ceramic components remain a higher-barrier segment, with Japanese and US suppliers maintaining strong positions and selected Chinese suppliers moving into volume production. Temperature measurement and sealing components form adjacent but important sub-segments, where specialized suppliers compete based on application know-how and long-term reliability rather than broad product catalogs.

Demand growth through the next few years is expected to be supported by 300mm fab expansion, mature-node localization, power semiconductor capacity additions, and compound semiconductor epitaxy. The rise of SiC and GaN manufacturing increases the demand for SiC-coated graphite, high-purity graphite, and high-temperature ceramic components, while continued investment in memory, logic, and specialty fabs supports quartzware and ceramic heater demand for diffusion, oxidation, LPCVD, and annealing tools. Public equipment-market data from SEMI indicates that global semiconductor manufacturing equipment investment remains structurally high, providing an upper-level demand foundation for the component market.

The competitive landscape is expected to evolve toward higher specialization, tighter OEM qualification, and stronger regional supply-chain localization. Leading suppliers will continue to benefit from long qualification cycles, global service coverage, and deep materials know-how. At the same time, Chinese suppliers are likely to gain share in quartzware, selected ceramic components, and replacement parts as domestic fabs and equipment OEMs localize procurement. However, high-end SiC-coated graphite, advanced ceramic heaters, and ultra-high-purity engineered components will still require sustained investment in materials, precision machining, cleaning, metrology, coating, and batch consistency before broader substitution can occur.

LPI (LP Information)' newest research report, the "Components for Semiconductor Thermal Processing Equipment Industry Forecast" looks at past sales and reviews total

world Components for Semiconductor Thermal Processing Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Components for Semiconductor Thermal Processing Equipment sales for 2026 through 2032. With Components for Semiconductor Thermal Processing Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Components for Semiconductor Thermal Processing Equipment industry.

This Insight Report provides a comprehensive analysis of the global Components for Semiconductor Thermal Processing Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Components for Semiconductor Thermal Processing Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Components for Semiconductor Thermal Processing Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Components for Semiconductor Thermal Processing Equipment and breaks down the forecast by Material Platform, by Equipment Type, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Components for Semiconductor Thermal Processing Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Components for Semiconductor Thermal Processing Equipment market by product type, application, key players and key regions and countries.

Segmentation by Material Platform:

Fused Quartz / High-Purity Quartz

SiC & SiC-Coated Graphite

Advanced Ceramics

Ultra-Pure Graphite / Carbon

High-Performance Polymers & Elastomers

Metals & Alloy Assemblies

Other Materials

Segmentation by Product Function:

Wafer Support & Handling Components

Process Chamber & Reactor Quartzware

Heating & Thermal-Uniformity Components

Temperature Sensing & Control Components

Sealing, Insulation & Ancillary Components

Other Process-Critical Components

Segmentation by Process Application:

Oxidation & Diffusion

Annealing & Dopant Activation

LPCVD Film Deposition

Epitaxy & Compound Semiconductor Growth

Thermal Cleaning / Pre-treatment Adjacent

Other Thermal Applications

Segmentation by Equipment Type:

Batch Diffusion / Oxidation Furnaces

LPCVD / Low-Pressure Furnace Systems

RTP / RTA / Spike Anneal Tools

Epitaxy / MOCVD Reactors

Laser Anneal / Advanced Single-Wafer Thermal Tools

Other Thermal Processing Tools

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Ferrotec Holdings Corporation

CoorsTek, Inc.

WONIK QnC Corporation

Schunk Xycarb Technology

Tosoh Quartz

SGL Carbon SE

Toyo Tanso

Mersen S.A.

Momentive Technologies

Kyocera Corporation

NGK Insulators

MARUWA

Watlow

Advanced Energy

Greene Tweed

Parker Hannifin

Morgan Advanced Materials

Raesch Quarz

Technical Glass Products

Uniglass

AGC Ceramics

Fralock

Techno Quartz Inc.

Hubei Feilihua

Suzhou Kema

Beijing Kaide Quartz

Shanghai Qianghua

Ningbo Yunde

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Components for Semiconductor Thermal Processing Equipment Market Size (2021-2032)

2.1.2 Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Region (2021 VS 2025 VS 2032)

2.1.3 World Current & Future Analysis for Components for Semiconductor Thermal Processing Equipment by Country/Region (2021, 2025 & 2032)

2.2 Components for Semiconductor Thermal Processing Equipment Segment by Material Platform

2.2.1 Fused Quartz / High-Purity Quartz

2.2.2 SiC & SiC-Coated Graphite

2.2.3 Advanced Ceramics

2.2.4 Ultra-Pure Graphite / Carbon

2.2.5 High-Performance Polymers & Elastomers

2.2.6 Metals & Alloy Assemblies

2.2.7 Other Materials

2.2.8 Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform

2.2.8.1 Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Material Platform (2021 VS 2025 VS 2032)

2.2.8.2 Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

2.3 Components for Semiconductor Thermal Processing Equipment Segment by Product Function

2.3.1 Wafer Support & Handling Components

2.3.2 Process Chamber & Reactor Quartzware

2.3.3 Heating & Thermal-Uniformity Components

2.3.4 Temperature Sensing & Control Components

2.3.5 Sealing, Insulation & Ancillary Components

2.3.6 Other Process-Critical Components

2.3.7 Components for Semiconductor Thermal Processing Equipment Market Size by Product Function

2.3.7.1 Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Product Function (2021 VS 2025 VS 2032)

2.3.7.2 Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Product Function (2021-2026)

2.4 Components for Semiconductor Thermal Processing Equipment Segment by Process Application

2.4.1 Oxidation & Diffusion

2.4.2 Annealing & Dopant Activation

2.4.3 LPCVD Film Deposition

2.4.4 Epitaxy & Compound Semiconductor Growth

2.4.5 Thermal Cleaning / Pre-treatment Adjacent

2.4.6 Other Thermal Applications

2.4.7 Components for Semiconductor Thermal Processing Equipment Market Size by Process Application

2.4.7.1 Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Process Application (2021 VS 2025 VS 2032)

2.4.7.2 Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Process Application (2021-2026)

2.5 Components for Semiconductor Thermal Processing Equipment Segment by Equipment Type

2.5.1 Batch Diffusion / Oxidation Furnaces

2.5.2 LPCVD / Low-Pressure Furnace Systems

2.5.3 RTP / RTA / Spike Anneal Tools

2.5.4 Epitaxy / MOCVD Reactors

2.5.5 Laser Anneal / Advanced Single-Wafer Thermal Tools

2.5.6 Other Thermal Processing Tools

2.5.7 Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type

2.5.7.1 Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Equipment Type (2021 VS 2025 VS 2032)

2.5.7.2 Global Components for Semiconductor Thermal Processing Equipment

Market Size Market Share by Equipment Type (2021-2026)

3 COMPONENTS FOR SEMICONDUCTOR THERMAL PROCESSING EQUIPMENT MARKET SIZE BY PLAYER

3.1 Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Player

3.1.1 Global Components for Semiconductor Thermal Processing Equipment Revenue by Player (2021-2026)

3.1.2 Global Components for Semiconductor Thermal Processing Equipment Revenue Market Share by Player (2021-2026)

3.2 Global Components for Semiconductor Thermal Processing Equipment Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 COMPONENTS FOR SEMICONDUCTOR THERMAL PROCESSING EQUIPMENT BY REGION

4.1 Components for Semiconductor Thermal Processing Equipment Market Size by Region (2021-2026)

4.2 Global Components for Semiconductor Thermal Processing Equipment Annual Revenue by Country/Region (2021-2026)

4.3 Americas Components for Semiconductor Thermal Processing Equipment Market Size Growth (2021-2026)

4.4 APAC Components for Semiconductor Thermal Processing Equipment Market Size Growth (2021-2026)

4.5 Europe Components for Semiconductor Thermal Processing Equipment Market Size Growth (2021-2026)

4.6 Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Components for Semiconductor Thermal Processing Equipment Market Size by Country (2021-2026)

5.2 Americas Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026)

5.3 Americas Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Components for Semiconductor Thermal Processing Equipment Market Size by Region (2021-2026)

6.2 APAC Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026)

6.3 APAC Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Components for Semiconductor Thermal Processing Equipment Market Size by Country (2021-2026)

7.2 Europe Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026)

7.3 Europe Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Components for Semiconductor Thermal Processing Equipment by Region (2021-2026)

8.2 Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026)

8.3 Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL COMPONENTS FOR SEMICONDUCTOR THERMAL PROCESSING EQUIPMENT MARKET FORECAST

10.1 Global Components for Semiconductor Thermal Processing Equipment Forecast by Region (2027-2032)

10.1.1 Global Components for Semiconductor Thermal Processing Equipment Forecast by Region (2027-2032)

10.1.2 Americas Components for Semiconductor Thermal Processing Equipment Forecast

10.1.3 APAC Components for Semiconductor Thermal Processing Equipment Forecast

10.1.4 Europe Components for Semiconductor Thermal Processing Equipment Forecast

10.1.5 Middle East & Africa Components for Semiconductor Thermal Processing Equipment Forecast

10.2 Americas Components for Semiconductor Thermal Processing Equipment Forecast by Country (2027-2032)

10.2.1 United States Market Components for Semiconductor Thermal Processing Equipment Forecast

10.2.2 Canada Market Components for Semiconductor Thermal Processing

Equipment Forecast

10.2.3 Mexico Market Components for Semiconductor Thermal Processing Equipment Forecast

10.2.4 Brazil Market Components for Semiconductor Thermal Processing Equipment Forecast

10.3 APAC Components for Semiconductor Thermal Processing Equipment Forecast by Region (2027-2032)

10.3.1 China Components for Semiconductor Thermal Processing Equipment Market Forecast

10.3.2 Japan Market Components for Semiconductor Thermal Processing Equipment Forecast

10.3.3 Korea Market Components for Semiconductor Thermal Processing Equipment Forecast

10.3.4 Southeast Asia Market Components for Semiconductor Thermal Processing Equipment Forecast

10.3.5 India Market Components for Semiconductor Thermal Processing Equipment Forecast

10.3.6 Australia Market Components for Semiconductor Thermal Processing Equipment Forecast

10.4 Europe Components for Semiconductor Thermal Processing Equipment Forecast by Country (2027-2032)

10.4.1 Germany Market Components for Semiconductor Thermal Processing Equipment Forecast

10.4.2 France Market Components for Semiconductor Thermal Processing Equipment Forecast

10.4.3 UK Market Components for Semiconductor Thermal Processing Equipment Forecast

10.4.4 Italy Market Components for Semiconductor Thermal Processing Equipment Forecast

10.4.5 Russia Market Components for Semiconductor Thermal Processing Equipment Forecast

10.5 Middle East & Africa Components for Semiconductor Thermal Processing Equipment Forecast by Region (2027-2032)

10.5.1 Egypt Market Components for Semiconductor Thermal Processing Equipment Forecast

10.5.2 South Africa Market Components for Semiconductor Thermal Processing Equipment Forecast

10.5.3 Israel Market Components for Semiconductor Thermal Processing Equipment Forecast

10.5.4 Turkey Market Components for Semiconductor Thermal Processing Equipment Forecast

10.6 Global Components for Semiconductor Thermal Processing Equipment Forecast by Material Platform (2027-2032)

10.7 Global Components for Semiconductor Thermal Processing Equipment Forecast by Equipment Type (2027-2032)

10.7.1 GCC Countries Market Components for Semiconductor Thermal Processing Equipment Forecast

11 KEY PLAYERS ANALYSIS

11.1 Ferrotec Holdings Corporation

11.1.1 Ferrotec Holdings Corporation Company Information

11.1.2 Ferrotec Holdings Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

11.1.3 Ferrotec Holdings Corporation Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.1.4 Ferrotec Holdings Corporation Main Business Overview

11.1.5 Ferrotec Holdings Corporation Latest Developments

11.2 CoorsTek, Inc.

11.2.1 CoorsTek, Inc. Company Information

11.2.2 CoorsTek, Inc. Components for Semiconductor Thermal Processing Equipment Product Offered

11.2.3 CoorsTek, Inc. Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 CoorsTek, Inc. Main Business Overview

11.2.5 CoorsTek, Inc. Latest Developments

11.3 WONIK QnC Corporation

11.3.1 WONIK QnC Corporation Company Information

11.3.2 WONIK QnC Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

11.3.3 WONIK QnC Corporation Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 WONIK QnC Corporation Main Business Overview

11.3.5 WONIK QnC Corporation Latest Developments

11.4 Schunk Xycarb Technology

11.4.1 Schunk Xycarb Technology Company Information

11.4.2 Schunk Xycarb Technology Components for Semiconductor Thermal Processing Equipment Product Offered

11.4.3 Schunk Xycarb Technology Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 Schunk Xycarb Technology Main Business Overview

11.4.5 Schunk Xycarb Technology Latest Developments

11.5 Tosoh Quartz

11.5.1 Tosoh Quartz Company Information

11.5.2 Tosoh Quartz Components for Semiconductor Thermal Processing Equipment Product Offered

11.5.3 Tosoh Quartz Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Tosoh Quartz Main Business Overview

11.5.5 Tosoh Quartz Latest Developments

11.6 SGL Carbon SE

11.6.1 SGL Carbon SE Company Information

11.6.2 SGL Carbon SE Components for Semiconductor Thermal Processing Equipment Product Offered

11.6.3 SGL Carbon SE Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 SGL Carbon SE Main Business Overview

11.6.5 SGL Carbon SE Latest Developments

11.7 Toyo Tanso

11.7.1 Toyo Tanso Company Information

11.7.2 Toyo Tanso Components for Semiconductor Thermal Processing Equipment Product Offered

11.7.3 Toyo Tanso Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 Toyo Tanso Main Business Overview

11.7.5 Toyo Tanso Latest Developments

11.8 Mersen S.A.

11.8.1 Mersen S.A. Company Information

11.8.2 Mersen S.A. Components for Semiconductor Thermal Processing Equipment Product Offered

11.8.3 Mersen S.A. Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.8.4 Mersen S.A. Main Business Overview

11.8.5 Mersen S.A. Latest Developments

11.9 Momentive Technologies

11.9.1 Momentive Technologies Company Information

11.9.2 Momentive Technologies Components for Semiconductor Thermal Processing

Equipment Product Offered

11.9.3 Momenive Technologies Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.9.4 Momenive Technologies Main Business Overview

11.9.5 Momenive Technologies Latest Developments

11.10 Kyocera Corporation

11.10.1 Kyocera Corporation Company Information

11.10.2 Kyocera Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

11.10.3 Kyocera Corporation Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.10.4 Kyocera Corporation Main Business Overview

11.10.5 Kyocera Corporation Latest Developments

11.11 NGK Insulators

11.11.1 NGK Insulators Company Information

11.11.2 NGK Insulators Components for Semiconductor Thermal Processing Equipment Product Offered

11.11.3 NGK Insulators Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.11.4 NGK Insulators Main Business Overview

11.11.5 NGK Insulators Latest Developments

11.12 MARUWA

11.12.1 MARUWA Company Information

11.12.2 MARUWA Components for Semiconductor Thermal Processing Equipment Product Offered

11.12.3 MARUWA Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.12.4 MARUWA Main Business Overview

11.12.5 MARUWA Latest Developments

11.13 Watlow

11.13.1 Watlow Company Information

11.13.2 Watlow Components for Semiconductor Thermal Processing Equipment Product Offered

11.13.3 Watlow Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.13.4 Watlow Main Business Overview

11.13.5 Watlow Latest Developments

11.14 Advanced Energy

11.14.1 Advanced Energy Company Information

11.14.2 Advanced Energy Components for Semiconductor Thermal Processing
Equipment Product Offered

11.14.3 Advanced Energy Components for Semiconductor Thermal Processing
Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.14.4 Advanced Energy Main Business Overview

11.14.5 Advanced Energy Latest Developments

11.15 Greene Tweed

11.15.1 Greene Tweed Company Information

11.15.2 Greene Tweed Components for Semiconductor Thermal Processing
Equipment Product Offered

11.15.3 Greene Tweed Components for Semiconductor Thermal Processing
Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.15.4 Greene Tweed Main Business Overview

11.15.5 Greene Tweed Latest Developments

11.16 Parker Hannifin

11.16.1 Parker Hannifin Company Information

11.16.2 Parker Hannifin Components for Semiconductor Thermal Processing
Equipment Product Offered

11.16.3 Parker Hannifin Components for Semiconductor Thermal Processing
Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.16.4 Parker Hannifin Main Business Overview

11.16.5 Parker Hannifin Latest Developments

11.17 Morgan Advanced Materials

11.17.1 Morgan Advanced Materials Company Information

11.17.2 Morgan Advanced Materials Components for Semiconductor Thermal
Processing Equipment Product Offered

11.17.3 Morgan Advanced Materials Components for Semiconductor Thermal
Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.17.4 Morgan Advanced Materials Main Business Overview

11.17.5 Morgan Advanced Materials Latest Developments

11.18 Raesch Quarz

11.18.1 Raesch Quarz Company Information

11.18.2 Raesch Quarz Components for Semiconductor Thermal Processing
Equipment Product Offered

11.18.3 Raesch Quarz Components for Semiconductor Thermal Processing
Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.18.4 Raesch Quarz Main Business Overview

11.18.5 Raesch Quarz Latest Developments

11.19 Technical Glass Products

- 11.19.1 Technical Glass Products Company Information
- 11.19.2 Technical Glass Products Components for Semiconductor Thermal Processing Equipment Product Offered
- 11.19.3 Technical Glass Products Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)
- 11.19.4 Technical Glass Products Main Business Overview
- 11.19.5 Technical Glass Products Latest Developments
- 11.20 Uniglass
 - 11.20.1 Uniglass Company Information
 - 11.20.2 Uniglass Components for Semiconductor Thermal Processing Equipment Product Offered
 - 11.20.3 Uniglass Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 11.20.4 Uniglass Main Business Overview
 - 11.20.5 Uniglass Latest Developments
- 11.21 AGC Ceramics
 - 11.21.1 AGC Ceramics Company Information
 - 11.21.2 AGC Ceramics Components for Semiconductor Thermal Processing Equipment Product Offered
 - 11.21.3 AGC Ceramics Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 11.21.4 AGC Ceramics Main Business Overview
 - 11.21.5 AGC Ceramics Latest Developments
- 11.22 Fralock
 - 11.22.1 Fralock Company Information
 - 11.22.2 Fralock Components for Semiconductor Thermal Processing Equipment Product Offered
 - 11.22.3 Fralock Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 11.22.4 Fralock Main Business Overview
 - 11.22.5 Fralock Latest Developments
- 11.23 Techno Quartz Inc.
 - 11.23.1 Techno Quartz Inc. Company Information
 - 11.23.2 Techno Quartz Inc. Components for Semiconductor Thermal Processing Equipment Product Offered
 - 11.23.3 Techno Quartz Inc. Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)
 - 11.23.4 Techno Quartz Inc. Main Business Overview
 - 11.23.5 Techno Quartz Inc. Latest Developments

11.24 Hubei Feilihua

11.24.1 Hubei Feilihua Company Information

11.24.2 Hubei Feilihua Components for Semiconductor Thermal Processing Equipment Product Offered

11.24.3 Hubei Feilihua Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.24.4 Hubei Feilihua Main Business Overview

11.24.5 Hubei Feilihua Latest Developments

11.25 Suzhou Kema

11.25.1 Suzhou Kema Company Information

11.25.2 Suzhou Kema Components for Semiconductor Thermal Processing Equipment Product Offered

11.25.3 Suzhou Kema Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.25.4 Suzhou Kema Main Business Overview

11.25.5 Suzhou Kema Latest Developments

11.26 Beijing Kaide Quartz

11.26.1 Beijing Kaide Quartz Company Information

11.26.2 Beijing Kaide Quartz Components for Semiconductor Thermal Processing Equipment Product Offered

11.26.3 Beijing Kaide Quartz Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.26.4 Beijing Kaide Quartz Main Business Overview

11.26.5 Beijing Kaide Quartz Latest Developments

11.27 Shanghai Qianghua

11.27.1 Shanghai Qianghua Company Information

11.27.2 Shanghai Qianghua Components for Semiconductor Thermal Processing Equipment Product Offered

11.27.3 Shanghai Qianghua Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.27.4 Shanghai Qianghua Main Business Overview

11.27.5 Shanghai Qianghua Latest Developments

11.28 Ningbo Yunde

11.28.1 Ningbo Yunde Company Information

11.28.2 Ningbo Yunde Components for Semiconductor Thermal Processing Equipment Product Offered

11.28.3 Ningbo Yunde Components for Semiconductor Thermal Processing Equipment Revenue, Gross Margin and Market Share (2021-2026)

11.28.4 Ningbo Yunde Main Business Overview

11.28.5 Ningbo Yunde Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Components for Semiconductor Thermal Processing Equipment Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Fused Quartz / High-Purity Quartz

Table 4. Major Players of SiC & SiC-Coated Graphite

Table 5. Major Players of Advanced Ceramics

Table 6. Major Players of Ultra-Pure Graphite / Carbon

Table 7. Major Players of High-Performance Polymers & Elastomers

Table 8. Major Players of Metals & Alloy Assemblies

Table 9. Major Players of Other Materials

Table 10. Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Material Platform (2021 VS 2025 VS 2032) & (\$ millions)

Table 11. Global Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026) & (\$ millions)

Table 12. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

Table 13. Major Players of Wafer Support & Handling Components

Table 14. Major Players of Process Chamber & Reactor Quartzware

Table 15. Major Players of Heating & Thermal-Uniformity Components

Table 16. Major Players of Temperature Sensing & Control Components

Table 17. Major Players of Sealing, Insulation & Ancillary Components

Table 18. Major Players of Other Process-Critical Components

Table 19. Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Product Function (2021 VS 2025 VS 2032) & (\$ millions)

Table 20. Global Components for Semiconductor Thermal Processing Equipment Market Size by Product Function (2021-2026) & (\$ millions)

Table 21. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Product Function (2021-2026)

Table 22. Major Players of Oxidation & Diffusion

Table 23. Major Players of Annealing & Dopant Activation

Table 24. Major Players of LPCVD Film Deposition

Table 25. Major Players of Epitaxy & Compound Semiconductor Growth

Table 26. Major Players of Thermal Cleaning / Pre-treatment Adjacent

Table 27. Major Players of Other Thermal Applications

Table 28. Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Process Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 29. Global Components for Semiconductor Thermal Processing Equipment Market Size by Process Application (2021-2026) & (\$ millions)

Table 30. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Process Application (2021-2026)

Table 31. Components for Semiconductor Thermal Processing Equipment Market Size CAGR by Equipment Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 32. Global Components for Semiconductor Thermal Processing Equipment Market Size by Equipment Type (2021-2026) & (\$ millions)

Table 33. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Equipment Type (2021-2026)

Table 34. Global Components for Semiconductor Thermal Processing Equipment Revenue by Player (2021-2026) & (\$ millions)

Table 35. Global Components for Semiconductor Thermal Processing Equipment Revenue Market Share by Player (2021-2026)

Table 36. Components for Semiconductor Thermal Processing Equipment Key Players Head office and Products Offered

Table 37. Components for Semiconductor Thermal Processing Equipment Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Mergers & Acquisitions, Expansion

Table 40. Global Components for Semiconductor Thermal Processing Equipment Market Size by Region (2021-2026) & (\$ millions)

Table 41. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Region (2021-2026)

Table 42. Global Components for Semiconductor Thermal Processing Equipment Revenue by Country/Region (2021-2026) & (\$ millions)

Table 43. Global Components for Semiconductor Thermal Processing Equipment Revenue Market Share by Country/Region (2021-2026)

Table 44. Americas Components for Semiconductor Thermal Processing Equipment Market Size by Country (2021-2026) & (\$ millions)

Table 45. Americas Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Country (2021-2026)

Table 46. Americas Components for Semiconductor Thermal Processing Equipment Market Size by Material Platform (2021-2026) & (\$ millions)

Table 47. Americas Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

Table 48. Americas Components for Semiconductor Thermal Processing Equipment

Market Size by Equipment Type (2021-2026) & (\$ millions)

Table 49. Americas Components for Semiconductor Thermal Processing Equipment

Market Size Market Share by Equipment Type (2021-2026)

Table 50. APAC Components for Semiconductor Thermal Processing Equipment

Market Size by Region (2021-2026) & (\$ millions)

Table 51. APAC Components for Semiconductor Thermal Processing Equipment

Market Size Market Share by Region (2021-2026)

Table 52. APAC Components for Semiconductor Thermal Processing Equipment

Market Size by Material Platform (2021-2026) & (\$ millions)

Table 53. APAC Components for Semiconductor Thermal Processing Equipment

Market Size by Equipment Type (2021-2026) & (\$ millions)

Table 54. Europe Components for Semiconductor Thermal Processing Equipment

Market Size by Country (2021-2026) & (\$ millions)

Table 55. Europe Components for Semiconductor Thermal Processing Equipment

Market Size Market Share by Country (2021-2026)

Table 56. Europe Components for Semiconductor Thermal Processing Equipment

Market Size by Material Platform (2021-2026) & (\$ millions)

Table 57. Europe Components for Semiconductor Thermal Processing Equipment

Market Size by Equipment Type (2021-2026) & (\$ millions)

Table 58. Middle East & Africa Components for Semiconductor Thermal Processing
Equipment Market Size by Region (2021-2026) & (\$ millions)

Table 59. Middle East & Africa Components for Semiconductor Thermal Processing
Equipment Market Size by Material Platform (2021-2026) & (\$ millions)

Table 60. Middle East & Africa Components for Semiconductor Thermal Processing
Equipment Market Size by Equipment Type (2021-2026) & (\$ millions)

Table 61. Key Market Drivers & Growth Opportunities of Components for
Semiconductor Thermal Processing Equipment

Table 62. Key Market Challenges & Risks of Components for Semiconductor Thermal
Processing Equipment

Table 63. Key Industry Trends of Components for Semiconductor Thermal Processing
Equipment

Table 64. Global Components for Semiconductor Thermal Processing Equipment
Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 65. Global Components for Semiconductor Thermal Processing Equipment
Market Size Market Share Forecast by Region (2027-2032)

Table 66. Global Components for Semiconductor Thermal Processing Equipment
Market Size Forecast by Material Platform (2027-2032) & (\$ millions)

Table 67. Global Components for Semiconductor Thermal Processing Equipment
Market Size Forecast by Equipment Type (2027-2032) & (\$ millions)

Table 68. Ferrotec Holdings Corporation Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 69. Ferrotec Holdings Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

Table 70. Ferrotec Holdings Corporation Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 71. Ferrotec Holdings Corporation Main Business

Table 72. Ferrotec Holdings Corporation Latest Developments

Table 73. CoorsTek, Inc. Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 74. CoorsTek, Inc. Components for Semiconductor Thermal Processing Equipment Product Offered

Table 75. CoorsTek, Inc. Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 76. CoorsTek, Inc. Main Business

Table 77. CoorsTek, Inc. Latest Developments

Table 78. WONIK QnC Corporation Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 79. WONIK QnC Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

Table 80. WONIK QnC Corporation Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 81. WONIK QnC Corporation Main Business

Table 82. WONIK QnC Corporation Latest Developments

Table 83. Schunk Xycarb Technology Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 84. Schunk Xycarb Technology Components for Semiconductor Thermal Processing Equipment Product Offered

Table 85. Schunk Xycarb Technology Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 86. Schunk Xycarb Technology Main Business

Table 87. Schunk Xycarb Technology Latest Developments

Table 88. Tosoh Quartz Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 89. Tosoh Quartz Components for Semiconductor Thermal Processing Equipment Product Offered

Table 90. Tosoh Quartz Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 91. Tosoh Quartz Main Business
Table 92. Tosoh Quartz Latest Developments
Table 93. SGL Carbon SE Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 94. SGL Carbon SE Components for Semiconductor Thermal Processing Equipment Product Offered
Table 95. SGL Carbon SE Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 96. SGL Carbon SE Main Business
Table 97. SGL Carbon SE Latest Developments
Table 98. Toyo Tanso Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 99. Toyo Tanso Components for Semiconductor Thermal Processing Equipment Product Offered
Table 100. Toyo Tanso Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 101. Toyo Tanso Main Business
Table 102. Toyo Tanso Latest Developments
Table 103. Mersen S.A. Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 104. Mersen S.A. Components for Semiconductor Thermal Processing Equipment Product Offered
Table 105. Mersen S.A. Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 106. Mersen S.A. Main Business
Table 107. Mersen S.A. Latest Developments
Table 108. Momenite Technologies Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 109. Momenite Technologies Components for Semiconductor Thermal Processing Equipment Product Offered
Table 110. Momenite Technologies Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 111. Momenite Technologies Main Business
Table 112. Momenite Technologies Latest Developments
Table 113. Kyocera Corporation Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 114. Kyocera Corporation Components for Semiconductor Thermal Processing Equipment Product Offered

Table 115. Kyocera Corporation Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 116. Kyocera Corporation Main Business

Table 117. Kyocera Corporation Latest Developments

Table 118. NGK Insulators Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 119. NGK Insulators Components for Semiconductor Thermal Processing Equipment Product Offered

Table 120. NGK Insulators Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 121. NGK Insulators Main Business

Table 122. NGK Insulators Latest Developments

Table 123. MARUWA Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 124. MARUWA Components for Semiconductor Thermal Processing Equipment Product Offered

Table 125. MARUWA Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 126. MARUWA Main Business

Table 127. MARUWA Latest Developments

Table 128. Watlow Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 129. Watlow Components for Semiconductor Thermal Processing Equipment Product Offered

Table 130. Watlow Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 131. Watlow Main Business

Table 132. Watlow Latest Developments

Table 133. Advanced Energy Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 134. Advanced Energy Components for Semiconductor Thermal Processing Equipment Product Offered

Table 135. Advanced Energy Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 136. Advanced Energy Main Business

Table 137. Advanced Energy Latest Developments

Table 138. Greene Tweed Details, Company Type, Components for Semiconductor

Thermal Processing Equipment Area Served and Its Competitors

Table 139. Greene Tweed Components for Semiconductor Thermal Processing Equipment Product Offered

Table 140. Greene Tweed Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 141. Greene Tweed Main Business

Table 142. Greene Tweed Latest Developments

Table 143. Parker Hannifin Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 144. Parker Hannifin Components for Semiconductor Thermal Processing Equipment Product Offered

Table 145. Parker Hannifin Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 146. Parker Hannifin Main Business

Table 147. Parker Hannifin Latest Developments

Table 148. Morgan Advanced Materials Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 149. Morgan Advanced Materials Components for Semiconductor Thermal Processing Equipment Product Offered

Table 150. Morgan Advanced Materials Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 151. Morgan Advanced Materials Main Business

Table 152. Morgan Advanced Materials Latest Developments

Table 153. Raesch Quarz Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 154. Raesch Quarz Components for Semiconductor Thermal Processing Equipment Product Offered

Table 155. Raesch Quarz Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 156. Raesch Quarz Main Business

Table 157. Raesch Quarz Latest Developments

Table 158. Technical Glass Products Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 159. Technical Glass Products Components for Semiconductor Thermal Processing Equipment Product Offered

Table 160. Technical Glass Products Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 161. Technical Glass Products Main Business
Table 162. Technical Glass Products Latest Developments
Table 163. Uniglass Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 164. Uniglass Components for Semiconductor Thermal Processing Equipment Product Offered
Table 165. Uniglass Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 166. Uniglass Main Business
Table 167. Uniglass Latest Developments
Table 168. AGC Ceramics Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 169. AGC Ceramics Components for Semiconductor Thermal Processing Equipment Product Offered
Table 170. AGC Ceramics Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 171. AGC Ceramics Main Business
Table 172. AGC Ceramics Latest Developments
Table 173. Fralock Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 174. Fralock Components for Semiconductor Thermal Processing Equipment Product Offered
Table 175. Fralock Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 176. Fralock Main Business
Table 177. Fralock Latest Developments
Table 178. Techno Quartz Inc. Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 179. Techno Quartz Inc. Components for Semiconductor Thermal Processing Equipment Product Offered
Table 180. Techno Quartz Inc. Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 181. Techno Quartz Inc. Main Business
Table 182. Techno Quartz Inc. Latest Developments
Table 183. Hubei Feilihua Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors
Table 184. Hubei Feilihua Components for Semiconductor Thermal Processing Equipment Product Offered
Table 185. Hubei Feilihua Components for Semiconductor Thermal Processing

Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 186. Hubei Feilihua Main Business

Table 187. Hubei Feilihua Latest Developments

Table 188. Suzhou Kema Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 189. Suzhou Kema Components for Semiconductor Thermal Processing Equipment Product Offered

Table 190. Suzhou Kema Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 191. Suzhou Kema Main Business

Table 192. Suzhou Kema Latest Developments

Table 193. Beijing Kaide Quartz Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 194. Beijing Kaide Quartz Components for Semiconductor Thermal Processing Equipment Product Offered

Table 195. Beijing Kaide Quartz Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 196. Beijing Kaide Quartz Main Business

Table 197. Beijing Kaide Quartz Latest Developments

Table 198. Shanghai Qianghua Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 199. Shanghai Qianghua Components for Semiconductor Thermal Processing Equipment Product Offered

Table 200. Shanghai Qianghua Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 201. Shanghai Qianghua Main Business

Table 202. Shanghai Qianghua Latest Developments

Table 203. Ningbo Yunde Details, Company Type, Components for Semiconductor Thermal Processing Equipment Area Served and Its Competitors

Table 204. Ningbo Yunde Components for Semiconductor Thermal Processing Equipment Product Offered

Table 205. Ningbo Yunde Components for Semiconductor Thermal Processing Equipment Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 206. Ningbo Yunde Main Business

Table 207. Ningbo Yunde Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Components for Semiconductor Thermal Processing Equipment Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Components for Semiconductor Thermal Processing Equipment Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. Components for Semiconductor Thermal Processing Equipment Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Components for Semiconductor Thermal Processing Equipment Sales Market Share by Country/Region (2025)

Figure 8. Components for Semiconductor Thermal Processing Equipment Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform in 2025

Figure 10. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Product Function in 2025

Figure 11. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Process Application in 2025

Figure 12. Components for Semiconductor Thermal Processing Equipment in Batch Diffusion / Oxidation Furnaces

Figure 13. Global Components for Semiconductor Thermal Processing Equipment Market: Batch Diffusion / Oxidation Furnaces (2021-2026) & (\$ millions)

Figure 14. Components for Semiconductor Thermal Processing Equipment in LPCVD / Low-Pressure Furnace Systems

Figure 15. Global Components for Semiconductor Thermal Processing Equipment Market: LPCVD / Low-Pressure Furnace Systems (2021-2026) & (\$ millions)

Figure 16. Components for Semiconductor Thermal Processing Equipment in RTP / RTA / Spike Anneal Tools

Figure 17. Global Components for Semiconductor Thermal Processing Equipment Market: RTP / RTA / Spike Anneal Tools (2021-2026) & (\$ millions)

Figure 18. Components for Semiconductor Thermal Processing Equipment in Epitaxy / MOCVD Reactors

Figure 19. Global Components for Semiconductor Thermal Processing Equipment Market: Epitaxy / MOCVD Reactors (2021-2026) & (\$ millions)

Figure 20. Components for Semiconductor Thermal Processing Equipment in Laser Anneal / Advanced Single-Wafer Thermal Tools

Figure 21. Global Components for Semiconductor Thermal Processing Equipment Market: Laser Anneal / Advanced Single-Wafer Thermal Tools (2021-2026) & (\$ millions)

Figure 22. Components for Semiconductor Thermal Processing Equipment in Other Thermal Processing Tools

Figure 23. Global Components for Semiconductor Thermal Processing Equipment Market: Other Thermal Processing Tools (2021-2026) & (\$ millions)

Figure 24. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Equipment Type in 2025

Figure 25. Global Components for Semiconductor Thermal Processing Equipment Revenue Market Share by Player in 2025

Figure 26. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Region (2021-2026)

Figure 27. Americas Components for Semiconductor Thermal Processing Equipment Market Size 2021-2026 (\$ millions)

Figure 28. APAC Components for Semiconductor Thermal Processing Equipment Market Size 2021-2026 (\$ millions)

Figure 29. Europe Components for Semiconductor Thermal Processing Equipment Market Size 2021-2026 (\$ millions)

Figure 30. Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size 2021-2026 (\$ millions)

Figure 31. Americas Components for Semiconductor Thermal Processing Equipment Value Market Share by Country in 2025

Figure 32. United States Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 33. Canada Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 34. Mexico Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 35. Brazil Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 36. APAC Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Region in 2025

Figure 37. APAC Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

Figure 38. APAC Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Equipment Type (2021-2026)

Figure 39. China Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 40. Japan Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 41. South Korea Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 42. Southeast Asia Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 43. India Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 44. Australia Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 45. Europe Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Country in 2025

Figure 46. Europe Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

Figure 47. Europe Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Equipment Type (2021-2026)

Figure 48. Germany Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 49. France Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 50. UK Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 51. Italy Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 52. Russia Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 53. Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Region (2021-2026)

Figure 54. Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Material Platform (2021-2026)

Figure 55. Middle East & Africa Components for Semiconductor Thermal Processing Equipment Market Size Market Share by Equipment Type (2021-2026)

Figure 56. Egypt Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 57. South Africa Components for Semiconductor Thermal Processing Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 58. Israel Components for Semiconductor Thermal Processing Equipment

Market Size Growth 2021-2026 (\$ millions)

Figure 59. Turkey Components for Semiconductor Thermal Processing Equipment

Market Size Growth 2021-2026 (\$ millions)

Figure 60. GCC Countries Components for Semiconductor Thermal Processing

Equipment Market Size Growth 2021-2026 (\$ millions)

Figure 61. Americas Components for Semiconductor Thermal Processing Equipment

Market Size 2027-2032 (\$ millions)

Figure 62. APAC Components for Semiconductor Thermal Processing Equipment

Market Size 2027-2032 (\$ millions)

Figure 63. Europe Components for Semiconductor Thermal Processing Equipment

Market Size 2027-2032 (\$ millions)

Figure 64. Middle East & Africa Components for Semiconductor Thermal Processing
Equipment Market Size 2027-2032 (\$ millions)

Figure 65. United States Components for Semiconductor Thermal Processing
Equipment Market Size 2027-2032 (\$ millions)

Figure 66. Canada Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 67. Mexico Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 68. Brazil Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 69. China Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 70. Japan Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 71. Korea Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 72. Southeast Asia Components for Semiconductor Thermal Processing
Equipment Market Size 2027-2032 (\$ millions)

Figure 73. India Components for Semiconductor Thermal Processing Equipment Market
Size 2027-2032 (\$ millions)

Figure 74. Australia Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 75. Germany Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 76. France Components for Semiconductor Thermal Processing Equipment
Market Size 2027-2032 (\$ millions)

Figure 77. UK Components for Semiconductor Thermal Processing Equipment Market
Size 2027-2032 (\$ millions)

Figure 78. Italy Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 79. Russia Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 80. Egypt Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 81. South Africa Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 82. Israel Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 83. Turkey Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

Figure 84. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share Forecast by Material Platform (2027-2032)

Figure 85. Global Components for Semiconductor Thermal Processing Equipment Market Size Market Share Forecast by Equipment Type (2027-2032)

Figure 86. GCC Countries Components for Semiconductor Thermal Processing Equipment Market Size 2027-2032 (\$ millions)

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