

Global Non-metallic Parts for Semiconductor Equipment Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Non-metallic Parts for Semiconductor Equipment market size is predicted to grow from US\$ 8396 million in 2025 to US\$ 14643 million in 2032; it is expected to grow at a CAGR of 8.1% from 2026 to 2032.

Non-metallic parts for semiconductor manufacturing equipment refer to process-critical parts, consumables and structural components made from high-purity silicon, quartz or fused silica, alumina, aluminum nitride, yttria, YAG, silicon nitride, zirconia, silicon carbide, graphite and carbon-based composite materials. These components are manufactured through crystal growth, quartz forming, CVD, CVD coating, ceramic sintering, hot pressing, precision machining, ultra-cleaning, surface treatment and clean packaging. They are used as process-chamber parts, wafer-supporting parts, thermal-field parts, insulating structures, wafer-handling components, gas distribution parts and consumables in semiconductor manufacturing equipment. Typical products include silicon electrodes, silicon rings, quartz tubes, quartz boats, quartz chambers, ceramic chucks, ceramic arms, ceramic showerheads, SiC rings, CVD-SiC components, SiC-coated graphite susceptors, graphite thermal-field components and ceramic end effectors. Their main value lies in improving chamber cleanliness, corrosion resistance, plasma erosion resistance, thermal stability, dimensional precision, particle control and process repeatability in semiconductor production tools.

Non-metallic components for semiconductor manufacturing equipment cover silicon parts, quartz components, advanced ceramic parts, silicon carbide components and graphite or carbon-based thermal-field parts. They are widely used as process-chamber parts, wafer-supporting structures, gas distribution components, thermal-field parts, electrical insulators, wafer-handling components and consumables in wafer fabrication

and selected advanced packaging equipment. Their value is increasingly linked to equipment uptime, chamber matching, particle performance, process stability, yield and cost of ownership. As semiconductor processes move toward higher aspect ratios, more complex materials and more stringent contamination control, non-metallic components are shifting from standard consumables to process-enabling parts. Official product information from CoorsTek, Kyocera and CeramTec shows that semiconductor-grade ceramics are used across wafer processing, etch, deposition, wafer handling, inspection and high-precision equipment structures.

By product route, silicon parts are concentrated in dry etch tools, including silicon electrodes, rings, focus rings and customized chamber parts. Quartz parts are used in diffusion, oxidation, annealing, cleaning, epitaxy and high-temperature process equipment, including tubes, boats, bell jars, tanks, carriers and chambers. Advanced ceramic parts cover alumina, aluminum nitride, yttria, YAG, silicon nitride, zirconia and SiSiC components used in ceramic chucks, end effectors, arms, insulators, liners, showerheads and precision structural parts. SiC parts include CVD-SiC, solid SiC and SiC-coated graphite components for etch, epitaxy, MOCVD, RTP and high-temperature deposition. Graphite and carbon-based parts are used mainly in epitaxy, ion implantation and high-temperature thermal-field applications. The product scope is therefore best understood as a multi-material component platform rather than a single-material market. Schunk Xycarb states that it supplies SiC-coated graphite, quartz, ceramic and silicon consumable products for microelectronics, while Ferrotec lists CVD-SiC, quartz, ceramics and silicon parts in its equipment-related business.

Regionally, Japan, the United States, Europe and Korea remain the core high-end supply bases. Japanese suppliers have deep capabilities in quartzware, CVD-SiC, SiC-coated graphite, fine ceramics and high-temperature materials. U.S. suppliers are strong in custom silicon components, high-purity quartz, advanced ceramics and high-purity SiC material systems. European suppliers maintain strong positions in engineered ceramics, fused silica, graphite, carbon materials and high-temperature structures. Korean suppliers benefit from proximity to memory customers and have built a strong cluster around silicon electrodes and rings, quartz ware, Al₂O₃ and SiC parts for etch and deposition tools. China is entering a faster qualification and localization phase, with opportunities in domestic equipment platforms, mature-node replacement parts, second-source qualification by fabs, quartzware, ceramic components, SiC-coated parts and selected standardized etch consumables.

Demand is concentrated in etch, deposition, diffusion, annealing, RTP, epitaxy, MOCVD, wafer handling, inspection and selected packaging-related equipment. Etch is

one of the most value-dense applications because silicon electrodes, silicon rings, SiC rings, ceramic chamber parts, quartz components and plasma-resistant ceramics all scale with chamber count, process steps and replacement cycles. Diffusion, oxidation, annealing and high-temperature CVD drive demand for quartz tubes, boats, SiC boats, ceramic supports and thermal-field components. Epitaxy and MOCVD drive demand for SiC-coated graphite susceptors, trays, wafer carriers and high-purity graphite components. Wafer handling, inspection, metrology and lithography-related equipment require lightweight, stiff, low-thermal-expansion and high-precision ceramic structures. SEMI's 300mm fab equipment spending outlook points to continued equipment investment growth in 2026-2027, supporting demand for critical non-metallic process components.

Policy and supply-chain dynamics are also reinforcing the market. CHIPS for America, the European Chips Act and China's 14th Five-Year Plan all strengthen investment in semiconductor manufacturing, key equipment and critical materials. NIST states that the CHIPS and Science Act provided the U.S. Department of Commerce with USD 50 billion for semiconductor research, development and manufacturing programs. The European Commission states that the European Chips Act aims to reinforce the EU semiconductor ecosystem, ensure supply-chain resilience and reduce external dependencies. China's 14th Five-Year Plan also identifies IC design tools, key equipment and high-purity target materials as key development priorities. For non-metallic semiconductor equipment components, this policy environment supports regionalization, multi-sourcing, local qualification and capacity expansion. Future competition will increasingly depend on material purity, complex-shape precision machining, batch consistency, particle control, OEM qualification, fab validation and scalable delivery capability.

LPI (LP Information)' newest research report, the "Non-metallic Parts for Semiconductor Equipment Industry Forecast" looks at past sales and reviews total world Non-metallic Parts for Semiconductor Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-metallic Parts for Semiconductor Equipment sales for 2026 through 2032. With Non-metallic Parts for Semiconductor Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Non-metallic Parts for Semiconductor Equipment industry.

This Insight Report provides a comprehensive analysis of the global Non-metallic Parts for Semiconductor 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 Non-metallic Parts for Semiconductor Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Non-metallic Parts for Semiconductor Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-metallic Parts for Semiconductor Equipment and breaks down the forecast By Material Family, by Application, 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 Non-metallic Parts for Semiconductor Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-metallic Parts for Semiconductor Equipment market by product type, application, key players and key regions and countries.

Segmentation By Material Family:

Silicon Parts

Quartz/Fused Silica Parts

Advanced Ceramic Parts

Silicon Carbide Parts

Graphite/Carbon-based Parts

Other Non-metallic Parts

Segmentation By Component Form:

Rings/Electrodes

Tubes/Boats/Carriers

Chucks/Arms/End Effectors

Showerheads/Gas Distribution Parts

Liners/Plates/Shields

Susceptors/Thermal-field Parts

Other Custom Parts

Segmentation By Process Contact Level:

Direct Plasma-facing Components

Direct Wafer-contact Components

High-temperature Process Components

Chemical / Wet Process Components

Structural / Insulating Components

Other Contact Levels

Segmentation by Application:

Etch Equipment

Deposition Equipment

Diffusion/Furnace/Annealing Equipment

Epitaxy/MOCVD Equipment

Lithography/Metrology/Inspection Equipment

Wafer Handling/Transfer Equipment

Packaging/Backend Equipment

Other Equipment

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.

Silfex Inc.

Hana Materials Inc.

Worldex Industry & Trading Co., Ltd.

Mitsubishi Materials

CoorsTek

NGK Insulators

Kyocera

Ferrotec

TOTO Advanced Ceramics

Niterra Co., Ltd.

ASUZAC Fine Ceramics

Japan Fine Ceramics Co., Ltd. (JFC)

Maruwa

SiFusion

KC Parts Tech., Ltd.

RS Technologies Co., Ltd.

ThinkonSemi (Fujian Dynafine)

Techno Quartz Inc.

CMTX Co.,Ltd

Morgan Advanced Materials

CeramTec

Saint-Gobain

Schunk Xycarb Technology

MiCo Ceramics Co., Ltd.

WONIK QnC

Micro Ceramics Ltd

Suzhou KemaTek, Inc.

Tosoh Quartz Corporation

Heraeus Covantics

Shin-Etsu Quartz Products

SUMCO (JSQ)

Momentive Technologies

TKG Solmics

AGC

Tokai Carbon

Mersen

SGL Carbon

Toyo Tanso

Hunan Dezhi New Materials

Shenzhen Zhicheng Semiconductor Materials

Chengdu Ultra Pure Applied Materials

Chongqing Genori Technology Co., Ltd

Shanghai Companion

Sanzer (Shanghai) New Materials Technology

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