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Global Plasma-Resistant O-Rings Market Growth 2026-2032

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Abstracts

The global Plasma-Resistant O-Rings market size is predicted to grow from US$ 733 million in 2025 to US$ 1368 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 2032.

Plasma-resistant O-rings are high-performance elastomeric sealing components engineered for direct or indirect exposure to plasma environments, particularly in semiconductor and other high-vacuum manufacturing processes. These products are designed to maintain sealing integrity under oxygen- and fluorine-based plasma, reactive radicals, elevated temperatures, vacuum conditions, and aggressive process chemistries while minimizing particle generation, outgassing, trace-metal contamination, and compression set. The market is dominated by perfluoroelastomer FFKM O-rings, while specially formulated plasma-resistant FKM products serve selected applications with different temperature, lifetime, and cost requirements. Typical sealing locations include process chambers, chamber lids, gas delivery interfaces, gate and pendulum valves, vacuum lines, and other plasma-exposed equipment interfaces. Major process applications include plasma etching, plasma-enhanced deposition such as PECVD and PEALD, ashing and stripping, and plasma cleaning. Downstream demand is concentrated in semiconductor manufacturing, followed by flat panel display manufacturing, photovoltaic manufacturing, and LED and compound semiconductor production. Product selection is generally determined by plasma chemistry, operating temperature, purity requirements, seal location, equipment platform, and required preventive-maintenance interval rather than by elastomer chemistry alone.

Key FindingsThe global average selling price of plasma-resistant O-rings was approximately US$120–180 per unit in 2025.The industry average gross margin was approximately 45%–55%.FFKM O-rings are the core high-value product

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type.Semiconductor manufacturing is the largest downstream application.Plasma etching and plasma-enhanced deposition are the main application scenarios.Asia-Pacific is the largest demand region globally.Maintenance and periodic replacement of installed equipment provide stable recurring demand.

Market Trends

The principal technology trend is a shift from general chemical and thermal resistance toward process-specific plasma performance. Material development increasingly targets fluorine- and oxygen-plasma erosion, ultra-low particle generation, reduced outgassing, lower trace-metal contamination, high-temperature stability, and longer preventive-maintenance intervals. Leading semiconductor sealing portfolios now differentiate compounds for etch, deposition, ash/strip, and plasma-cleaning environments rather than relying on a single universal FFKM formulation.

Purity and sustainability requirements are also influencing formulation development. New-generation semiconductor FFKM compounds are moving toward cleaner formulations, including filler-free or fluorosurfactant-free approaches in selected products, while maintaining plasma resistance and service life. This evolution increases formulation complexity and further raises the importance of material know-how, contamination control, and application validation.

Market Dynamics

Demand is driven by two related but distinct cycles: expansion of new plasma-processing equipment and recurring consumption from the installed equipment base. SEMI reported that worldwide semiconductor manufacturing equipment sales increased 15% in 2025, supported by investment in advanced logic, memory, and AI-related capacity. For plasma-resistant O-rings, this equipment expansion creates initial installation demand while subsequently enlarging the base of chambers requiring routine seal replacement.

At the same time, longer-life FFKM compounds partially offset replacement-volume growth by extending maintenance intervals. Market value therefore depends not only on the number of seals consumed but also on the migration toward higher-performance, higher-value compounds capable of maintaining chamber cleanliness and process stability for longer periods.

Drivers

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Growth is primarily supported by expanding semiconductor wafer-fab capacity, increasing investment in advanced logic and memory, and continued use of plasma-intensive etch and deposition processes. Advanced manufacturing places greater emphasis on particle control, vacuum integrity, trace-metal purity, and equipment uptime, increasing the value of qualified high-performance seals. The recurring replacement requirement of chamber and valve O-rings further supports demand after equipment installation.

Restraints

The market faces long customer qualification cycles, particularly for seals positioned close to critical process chambers. A new compound must demonstrate compatibility with specific plasma chemistry, temperature, vacuum conditions, contamination limits, and equipment configurations, making supplier switching relatively slow. High-performance FFKM materials and cleanroom manufacturing also result in substantially higher costs than conventional industrial elastomer O-rings.

Opportunities

The largest opportunities are associated with localization of semiconductor consumables in Asia, development of longer-life compounds for aggressive fluorine and oxygen plasma environments, and expansion into increasingly demanding deposition and etch processes. Additional opportunities exist in flat panel display, photovoltaic, and LED and compound semiconductor manufacturing where plasma processing and high-vacuum equipment require specialized sealing performance.

Suppliers capable of combining proprietary elastomer formulation, precision molding, controlled post-curing, cleanroom cleaning and packaging, and direct application engineering are positioned to capture a larger share of high-value projects because semiconductor customers increasingly evaluate total chamber performance and maintenance cost rather than seal purchase price alone.

Challenges

The principal technical challenge is balancing multiple performance requirements simultaneously. Improving resistance to one plasma chemistry does not necessarily provide equivalent performance under another chemistry, while high-temperature resistance, compression set, particle generation, outgassing, mechanical strength, and trace-metal purity can involve formulation trade-offs. Qualification results are also highly dependent on seal location and specific equipment conditions.

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A second challenge is price competition as regional manufacturers expand semiconductor-grade FFKM production. Localized supply can shorten lead times and reduce procurement costs, but new suppliers must establish long-term process reliability and customer qualification records before competing broadly in critical plasma chamber positions.

Industry Chain Analysis

The upstream industry includes fluoropolymer and fluoroelastomer chemistry, FFKM and FKM base polymers, curing systems, fillers and other compound ingredients. Midstream manufacturers conduct compound formulation, mixing, tooling, precision molding, post-curing, dimensional inspection, ultra-clean processing, cleanroom packaging, and application qualification. Downstream customers include semiconductor equipment OEMs, wafer fabs, display manufacturers, photovoltaic manufacturers, and LED and compound semiconductor producers.

The industry chain is characterized by relatively concentrated high-end material and formulation expertise combined with a broader downstream molding and sealing ecosystem. For premium semiconductor applications, simply possessing FFKM molding capability is insufficient; process cleanliness, compound consistency, plasma testing, traceability, and customer qualification constitute important barriers to entry.

Value Chain Analysis

Value creation is concentrated in compound formulation, plasma-performance optimization, high-purity manufacturing, application engineering, and equipment or fab qualification. Base polymer represents an important cost component, but the commercial value of a qualified semiconductor O-ring is determined to a greater extent by its ability to reduce chamber contamination, extend maintenance intervals, maintain vacuum integrity, and improve equipment uptime.

Aftermarket and maintenance demand also has significant value-chain importance. Once a seal material is qualified for a specific process chamber or equipment platform, replacement demand can continue throughout the installed life of that platform, increasing customer stickiness and creating recurring revenue for qualified suppliers.

Segment Insights

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By material type, FFKM O-rings constitute the core premium segment, benefiting from broad chemical resistance, high-temperature performance, and suitability for aggressive plasma environments. Plasma-resistant FKM O-rings address selected applications with less extreme process conditions or greater sensitivity to material cost, while other elastomer formulations remain comparatively limited.

By downstream application, semiconductor manufacturing represents the dominant demand segment. Flat panel display manufacturing forms another established application, while photovoltaic manufacturing and LED and compound semiconductor manufacturing provide additional opportunities. Within semiconductor manufacturing, plasma etching and plasma-enhanced deposition are particularly important because seals in these processes experience sustained exposure to reactive chemistries, vacuum, and elevated temperatures.

Downstream Market Opportunities

Semiconductor manufacturing offers the strongest long-term opportunity, particularly in advanced logic, DRAM, NAND, power and compound semiconductor capacity where etch, deposition, ash/strip, and plasma cleaning remain essential processes. The combination of new equipment installations and a growing installed base supports both OEM demand and recurring fab maintenance demand.

Outside mainstream silicon semiconductor manufacturing, flat panel displays, photovoltaics, and LED and compound semiconductor manufacturing provide supplementary growth opportunities. These applications are generally smaller than the semiconductor segment but can require similar combinations of plasma resistance, vacuum sealing, cleanliness, and thermal stability.

Regional Insights

Asia-Pacific is the principal demand center because China, Taiwan, South Korea, and Japan collectively represent a major share of global semiconductor manufacturing and equipment investment. SEMI reported that China, Taiwan, and South Korea accounted for 79% of worldwide semiconductor equipment spending in 2025, while Japan also recorded continued equipment-investment growth. This concentration supports both first-fit and replacement demand for plasma-resistant O-rings.

North America, Japan, and Europe retain important positions in high-end material formulation, plasma-resistant compound development, and semiconductor equipment

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qualification. China and Taiwan are expanding localized manufacturing and qualification capabilities, increasing competition in regional replacement markets and gradually moving toward higher-value equipment-OEM programs.

Competitive Landscape Analysis

The competitive landscape is characterized by a relatively concentrated high-end tier and a broader group of regional specialist manufacturers. North American, Japanese, and European suppliers retain advantages in proprietary FFKM formulations, long equipment qualification histories, plasma-performance databases, and global semiconductor customer relationships. Competition at this level centers on plasma erosion, particle generation, outgassing, trace-metal purity, high-temperature stability, compression set, and demonstrated service life rather than price alone.

Asian suppliers, particularly manufacturers in China and Taiwan, are expanding cleanroom production, formulation capabilities, and semiconductor customer qualification. Their strongest near-term opportunities are localized replacement supply and cost-sensitive equipment platforms, while penetration of critical advanced-process chamber positions depends on long-term reliability data and OEM or fab validation. The market is therefore evolving toward a multilayer competitive structure combining global high-performance suppliers with increasingly capable regional manufacturers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Plasma-Resistant O-Rings Industry Forecast” looks at past sales and reviews total world Plasma-Resistant O-Rings sales in 2025, providing a comprehensive analysis by region and market sector of projected Plasma-Resistant O-Rings sales for 2026 through 2032. With Plasma-Resistant O-Rings sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Plasma-Resistant O-Rings industry.

This Insight Report provides a comprehensive analysis of the global Plasma-Resistant O-Rings landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Plasma-Resistant O-Rings portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Plasma-Resistant O-Rings market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Plasma-Resistant O-Rings and breaks down the forecast by Material Type, 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 Plasma-Resistant O-Rings.

This report presents a comprehensive overview, market shares, and growth opportunities of Plasma-Resistant O-Rings market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Material Type:

FFKM O-Rings

Plasma-Resistant FKM O-Rings

Others

Segmentation by Sealing Mode:

Static O-Rings

Dynamic O-Rings

Segmentation by Temperature Rating:

Below 250°C

250–300°C

Above 300°C

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Segmentation by Application:

Semiconductor Manufacturing

Flat Panel Display Manufacturing

Photovoltaic Manufacturing

LED and Compound Semiconductor Manufacturing

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

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- 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 analysing the company's coverage, product portfolio, its market penetration.

- Qnity Electronics, Inc.
- Greene Tweed & Co.
- Parker Hannifin Corporation
- Trelleborg AB
- VALQUA, LTD.

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NICHIAS Corporation

Eagle Industry Co., Ltd.

AIR WATER MACH INC.

IDEX Corporation

Freudenberg SE

Angst+Pfister Group

Ceetak Ltd.

Maxmold Polymer Co., Ltd.

MFC Sealing Technology Co., Ltd.

GE MAO RUBBER INDUSTRIAL CO., LTD.

KTSEAL CO., LTD.

Shanghai Xinmi Technology Co., Ltd.

Boilpeak Seals Technology (Jiangsu) Co., Ltd.

Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd.

Sichuan Dowhon New Materials Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Plasma-Resistant O-Rings market?

What factors are driving Plasma-Resistant O-Rings market growth, globally and by region?

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Which technologies are poised for the fastest growth by market and region?

How do Plasma-Resistant O-Rings market opportunities vary by end market size?

How does Plasma-Resistant O-Rings break out by Material Type, by Application?

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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 Plasma-Resistant O-Rings Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Plasma-Resistant O-Rings by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Plasma-Resistant O-Rings by Country/Region, 2021, 2025 & 2032
2.2 Plasma-Resistant O-Rings Segment by Material Type
  2.2.1 FFKM O-Rings
  2.2.2 Plasma-Resistant FKM O-Rings
  2.2.3 Others
  2.2.4 Plasma-Resistant O-Rings Sales by Material Type
    2.2.4.1 Global Plasma-Resistant O-Rings Sales Market Share by Material Type (2021-2026)
    2.2.4.2 Global Plasma-Resistant O-Rings Revenue and Market Share by Material Type (2021-2026)
    2.2.4.3 Global Plasma-Resistant O-Rings Sale Price by Material Type (2021-2026)
2.3 Plasma-Resistant O-Rings Segment by Sealing Mode
  2.3.1 Static O-Rings
  2.3.2 Dynamic O-Rings
  2.3.3 Plasma-Resistant O-Rings Sales by Sealing Mode
    2.3.3.1 Global Plasma-Resistant O-Rings Sales Market Share by Sealing Mode (2021-2026)
    2.3.3.2 Global Plasma-Resistant O-Rings Revenue and Market Share by Sealing Mode (2021-2026)

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2.3.3.3 Global Plasma-Resistant O-Rings Sale Price by Sealing Mode (2021-2026)
2.4 Plasma-Resistant O-Rings Segment by Temperature Rating
2.4.1 Below 250°C
2.4.2 250–300°C
2.4.3 Above 300°C
2.4.4 Plasma-Resistant O-Rings Sales by Temperature Rating
2.4.4.1 Global Plasma-Resistant O-Rings Sales Market Share by Temperature Rating (2021-2026)
2.4.4.2 Global Plasma-Resistant O-Rings Revenue and Market Share by Temperature Rating (2021-2026)
2.4.4.3 Global Plasma-Resistant O-Rings Sale Price by Temperature Rating (2021-2026)
2.5 Plasma-Resistant O-Rings Segment by Application
2.5.1 Semiconductor Manufacturing
2.5.2 Flat Panel Display Manufacturing
2.5.3 Photovoltaic Manufacturing
2.5.4 LED and Compound Semiconductor Manufacturing
2.5.5 Others
2.5.6 Plasma-Resistant O-Rings Sales by Application
2.5.6.1 Global Plasma-Resistant O-Rings Sale Market Share by Application (2021-2026)
2.5.6.2 Global Plasma-Resistant O-Rings Revenue and Market Share by Application (2021-2026)
2.5.6.3 Global Plasma-Resistant O-Rings Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Plasma-Resistant O-Rings Breakdown Data by Company
3.1.1 Global Plasma-Resistant O-Rings Annual Sales by Company (2021-2026)
3.1.2 Global Plasma-Resistant O-Rings Sales Market Share by Company (2021-2026)
3.2 Global Plasma-Resistant O-Rings Annual Revenue by Company (2021-2026)
3.2.1 Global Plasma-Resistant O-Rings Revenue by Company (2021-2026)
3.2.2 Global Plasma-Resistant O-Rings Revenue Market Share by Company (2021-2026)
3.3 Global Plasma-Resistant O-Rings Sale Price by Company
3.4 Key Manufacturers Plasma-Resistant O-Rings Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Plasma-Resistant O-Rings Product Location Distribution
3.4.2 Players Plasma-Resistant O-Rings Products Offered

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info@marketpublishers.com

3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PLASMA-RESISTANT O-RINGS BY GEOGRAPHIC REGION

4.1 World Historic Plasma-Resistant O-Rings Market Size by Geographic Region (2021-2026)
4.1.1 Global Plasma-Resistant O-Rings Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Plasma-Resistant O-Rings Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Plasma-Resistant O-Rings Market Size by Country/Region (2021-2026)
4.2.1 Global Plasma-Resistant O-Rings Annual Sales by Country/Region (2021-2026)
4.2.2 Global Plasma-Resistant O-Rings Annual Revenue by Country/Region (2021-2026)
4.3 Americas Plasma-Resistant O-Rings Sales Growth
4.4 APAC Plasma-Resistant O-Rings Sales Growth
4.5 Europe Plasma-Resistant O-Rings Sales Growth
4.6 Middle East & Africa Plasma-Resistant O-Rings Sales Growth

5 AMERICAS

5.1 Americas Plasma-Resistant O-Rings Sales by Country
5.1.1 Americas Plasma-Resistant O-Rings Sales by Country (2021-2026)
5.1.2 Americas Plasma-Resistant O-Rings Revenue by Country (2021-2026)
5.2 Americas Plasma-Resistant O-Rings Sales by Material Type (2021-2026)
5.3 Americas Plasma-Resistant O-Rings Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

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6.1 APAC Plasma-Resistant O-Rings Sales by Region
6.1.1 APAC Plasma-Resistant O-Rings Sales by Region (2021-2026)
6.1.2 APAC Plasma-Resistant O-Rings Revenue by Region (2021-2026)
6.2 APAC Plasma-Resistant O-Rings Sales by Material Type (2021-2026)
6.3 APAC Plasma-Resistant O-Rings Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Plasma-Resistant O-Rings by Country
7.1.1 Europe Plasma-Resistant O-Rings Sales by Country (2021-2026)
7.1.2 Europe Plasma-Resistant O-Rings Revenue by Country (2021-2026)
7.2 Europe Plasma-Resistant O-Rings Sales by Material Type (2021-2026)
7.3 Europe Plasma-Resistant O-Rings Sales by Application (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 Plasma-Resistant O-Rings by Country
8.1.1 Middle East & Africa Plasma-Resistant O-Rings Sales by Country (2021-2026)
8.1.2 Middle East & Africa Plasma-Resistant O-Rings Revenue by Country (2021-2026)
8.2 Middle East & Africa Plasma-Resistant O-Rings Sales by Material Type (2021-2026)
8.3 Middle East & Africa Plasma-Resistant O-Rings Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

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9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Plasma-Resistant O-Rings
10.3 Manufacturing Process Analysis of Plasma-Resistant O-Rings
10.4 Industry Chain Structure of Plasma-Resistant O-Rings

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Plasma-Resistant O-Rings Distributors
11.3 Plasma-Resistant O-Rings Customer

12 WORLD FORECAST REVIEW FOR PLASMA-RESISTANT O-RINGS BY GEOGRAPHIC REGION

12.1 Global Plasma-Resistant O-Rings Market Size Forecast by Region
  12.1.1 Global Plasma-Resistant O-Rings Forecast by Region (2027-2032)
  12.1.2 Global Plasma-Resistant O-Rings Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Plasma-Resistant O-Rings Forecast by Material Type (2027-2032)
12.7 Global Plasma-Resistant O-Rings Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Qnity Electronics, Inc.

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13.1.1 Qnity Electronics, Inc. Company Information
13.1.2 Qnity Electronics, Inc. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.1.3 Qnity Electronics, Inc. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Qnity Electronics, Inc. Main Business Overview
13.1.5 Qnity Electronics, Inc. Latest Developments
13.2 Greene Tweed & Co.
13.2.1 Greene Tweed & Co. Company Information
13.2.2 Greene Tweed & Co. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.2.3 Greene Tweed & Co. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Greene Tweed & Co. Main Business Overview
13.2.5 Greene Tweed & Co. Latest Developments
13.3 Parker Hannifin Corporation
13.3.1 Parker Hannifin Corporation Company Information
13.3.2 Parker Hannifin Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
13.3.3 Parker Hannifin Corporation Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Parker Hannifin Corporation Main Business Overview
13.3.5 Parker Hannifin Corporation Latest Developments
13.4 Trelleborg AB
13.4.1 Trelleborg AB Company Information
13.4.2 Trelleborg AB Plasma-Resistant O-Rings Product Portfolios and Specifications
13.4.3 Trelleborg AB Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Trelleborg AB Main Business Overview
13.4.5 Trelleborg AB Latest Developments
13.5 VALQUA, LTD.
13.5.1 VALQUA, LTD. Company Information
13.5.2 VALQUA, LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.5.3 VALQUA, LTD. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 VALQUA, LTD. Main Business Overview
13.5.5 VALQUA, LTD. Latest Developments
13.6 NICHIAS Corporation

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13.6.1 NICHIAS Corporation Company Information
13.6.2 NICHIAS Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
13.6.3 NICHIAS Corporation Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 NICHIAS Corporation Main Business Overview
13.6.5 NICHIAS Corporation Latest Developments
13.7 Eagle Industry Co., Ltd.
13.7.1 Eagle Industry Co., Ltd. Company Information
13.7.2 Eagle Industry Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.7.3 Eagle Industry Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Eagle Industry Co., Ltd. Main Business Overview
13.7.5 Eagle Industry Co., Ltd. Latest Developments
13.8 AIR WATER MACH INC.
13.8.1 AIR WATER MACH INC. Company Information
13.8.2 AIR WATER MACH INC. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.8.3 AIR WATER MACH INC. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 AIR WATER MACH INC. Main Business Overview
13.8.5 AIR WATER MACH INC. Latest Developments
13.9 IDEX Corporation
13.9.1 IDEX Corporation Company Information
13.9.2 IDEX Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
13.9.3 IDEX Corporation Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 IDEX Corporation Main Business Overview
13.9.5 IDEX Corporation Latest Developments
13.10 Freudenberg SE
13.10.1 Freudenberg SE Company Information
13.10.2 Freudenberg SE Plasma-Resistant O-Rings Product Portfolios and Specifications
13.10.3 Freudenberg SE Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Freudenberg SE Main Business Overview
13.10.5 Freudenberg SE Latest Developments

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13.11 Angst+Pfister Group
13.11.1 Angst+Pfister Group Company Information
13.11.2 Angst+Pfister Group Plasma-Resistant O-Rings Product Portfolios and Specifications
13.11.3 Angst+Pfister Group Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Angst+Pfister Group Main Business Overview
13.11.5 Angst+Pfister Group Latest Developments
13.12 Ceetak Ltd.
13.12.1 Ceetak Ltd. Company Information
13.12.2 Ceetak Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.12.3 Ceetak Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Ceetak Ltd. Main Business Overview
13.12.5 Ceetak Ltd. Latest Developments
13.13 Maxmold Polymer Co., Ltd.
13.13.1 Maxmold Polymer Co., Ltd. Company Information
13.13.2 Maxmold Polymer Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.13.3 Maxmold Polymer Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Maxmold Polymer Co., Ltd. Main Business Overview
13.13.5 Maxmold Polymer Co., Ltd. Latest Developments
13.14 MFC Sealing Technology Co., Ltd.
13.14.1 MFC Sealing Technology Co., Ltd. Company Information
13.14.2 MFC Sealing Technology Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.14.3 MFC Sealing Technology Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 MFC Sealing Technology Co., Ltd. Main Business Overview
13.14.5 MFC Sealing Technology Co., Ltd. Latest Developments
13.15 GE MAO RUBBER INDUSTRIAL CO., LTD.
13.15.1 GE MAO RUBBER INDUSTRIAL CO., LTD. Company Information
13.15.2 GE MAO RUBBER INDUSTRIAL CO., LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.15.3 GE MAO RUBBER INDUSTRIAL CO., LTD. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 GE MAO RUBBER INDUSTRIAL CO., LTD. Main Business Overview
13.15.5 GE MAO RUBBER INDUSTRIAL CO., LTD. Latest Developments

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13.16 KTSEAL CO., LTD.
13.16.1 KTSEAL CO., LTD. Company Information
13.16.2 KTSEAL CO., LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.16.3 KTSEAL CO., LTD. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 KTSEAL CO., LTD. Main Business Overview
13.16.5 KTSEAL CO., LTD. Latest Developments
13.17 Shanghai Xinmi Technology Co., Ltd.
13.17.1 Shanghai Xinmi Technology Co., Ltd. Company Information
13.17.2 Shanghai Xinmi Technology Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.17.3 Shanghai Xinmi Technology Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Shanghai Xinmi Technology Co., Ltd. Main Business Overview
13.17.5 Shanghai Xinmi Technology Co., Ltd. Latest Developments
13.18 Boilpeak Seals Technology (Jiangsu) Co., Ltd.
13.18.1 Boilpeak Seals Technology (Jiangsu) Co., Ltd. Company Information
13.18.2 Boilpeak Seals Technology (Jiangsu) Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.18.3 Boilpeak Seals Technology (Jiangsu) Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Boilpeak Seals Technology (Jiangsu) Co., Ltd. Main Business Overview
13.18.5 Boilpeak Seals Technology (Jiangsu) Co., Ltd. Latest Developments
13.19 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd.
13.19.1 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Company Information
13.19.2 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
13.19.3 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Main Business Overview
13.19.5 Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Latest Developments
13.20 Sichuan Dowhon New Materials Co., Ltd.
13.20.1 Sichuan Dowhon New Materials Co., Ltd. Company Information
13.20.2 Sichuan Dowhon New Materials Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications

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13.20.3 Sichuan Dowhon New Materials Co., Ltd. Plasma-Resistant O-Rings Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Sichuan Dowhon New Materials Co., Ltd. Main Business Overview
13.20.5 Sichuan Dowhon New Materials Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Plasma-Resistant O-Rings Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Plasma-Resistant O-Rings Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of FFKM O-Rings
Table 4. Major Players of Plasma-Resistant FKM O-Rings
Table 5. Major Players of Others
Table 6. Global Plasma-Resistant O-Rings Sales by Material Type (2021-2026) & (K Units)
Table 7. Global Plasma-Resistant O-Rings Sales Market Share by Material Type (2021-2026)
Table 8. Global Plasma-Resistant O-Rings Revenue by Material Type (2021-2026) & ($ million)
Table 9. Global Plasma-Resistant O-Rings Revenue Market Share by Material Type (2021-2026)
Table 10. Global Plasma-Resistant O-Rings Sale Price by Material Type (2021-2026) & (US$/Unit)
Table 11. Major Players of Static O-Rings
Table 12. Major Players of Dynamic O-Rings
Table 13. Global Plasma-Resistant O-Rings Sales by Sealing Mode (2021-2026) & (K Units)
Table 14. Global Plasma-Resistant O-Rings Sales Market Share by Sealing Mode (2021-2026)
Table 15. Global Plasma-Resistant O-Rings Revenue by Sealing Mode (2021-2026) & ($ million)
Table 16. Global Plasma-Resistant O-Rings Revenue Market Share by Sealing Mode (2021-2026)
Table 17. Global Plasma-Resistant O-Rings Sale Price by Sealing Mode (2021-2026) & (US$/Unit)
Table 18. Major Players of Below 250°C
Table 19. Major Players of 250–300°C
Table 20. Major Players of Above 300°C
Table 21. Global Plasma-Resistant O-Rings Sales by Temperature Rating (2021-2026) & (K Units)
Table 22. Global Plasma-Resistant O-Rings Sales Market Share by Temperature Rating

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(2021-2026)
Table 23. Global Plasma-Resistant O-Rings Revenue by Temperature Rating (2021-2026) & ($ million)
Table 24. Global Plasma-Resistant O-Rings Revenue Market Share by Temperature Rating (2021-2026)
Table 25. Global Plasma-Resistant O-Rings Sale Price by Temperature Rating (2021-2026) & (US$/Unit)
Table 26. Global Plasma-Resistant O-Rings Sale by Application (2021-2026) & (K Units)
Table 27. Global Plasma-Resistant O-Rings Sale Market Share by Application (2021-2026)
Table 28. Global Plasma-Resistant O-Rings Revenue by Application (2021-2026) & ($ million)
Table 29. Global Plasma-Resistant O-Rings Revenue Market Share by Application (2021-2026)
Table 30. Global Plasma-Resistant O-Rings Sale Price by Application (2021-2026) & (US$/Unit)
Table 31. Global Plasma-Resistant O-Rings Sales by Company (2021-2026) & (K Units)
Table 32. Global Plasma-Resistant O-Rings Sales Market Share by Company (2021-2026)
Table 33. Global Plasma-Resistant O-Rings Revenue by Company (2021-2026) & ($ millions)
Table 34. Global Plasma-Resistant O-Rings Revenue Market Share by Company (2021-2026)
Table 35. Global Plasma-Resistant O-Rings Sale Price by Company (2021-2026) & (US$/Unit)
Table 36. Key Manufacturers Plasma-Resistant O-Rings Producing Area Distribution and Sales Area
Table 37. Players Plasma-Resistant O-Rings Products Offered
Table 38. Plasma-Resistant O-Rings Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 39. New Products and Potential Entrants
Table 40. Market M&A Activity & Strategy
Table 41. Global Plasma-Resistant O-Rings Sales by Geographic Region (2021-2026) & (K Units)
Table 42. Global Plasma-Resistant O-Rings Sales Market Share Geographic Region (2021-2026)
Table 43. Global Plasma-Resistant O-Rings Revenue by Geographic Region (2021-2026) & ($ millions)

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Table 44. Global Plasma-Resistant O-Rings Revenue Market Share by Geographic Region (2021-2026)
Table 45. Global Plasma-Resistant O-Rings Sales by Country/Region (2021-2026) & (K Units)
Table 46. Global Plasma-Resistant O-Rings Sales Market Share by Country/Region (2021-2026)
Table 47. Global Plasma-Resistant O-Rings Revenue by Country/Region (2021-2026) & ($ millions)
Table 48. Global Plasma-Resistant O-Rings Revenue Market Share by Country/Region (2021-2026)
Table 49. Americas Plasma-Resistant O-Rings Sales by Country (2021-2026) & (K Units)
Table 50. Americas Plasma-Resistant O-Rings Sales Market Share by Country (2021-2026)
Table 51. Americas Plasma-Resistant O-Rings Revenue by Country (2021-2026) & ($ millions)
Table 52. Americas Plasma-Resistant O-Rings Sales by Material Type (2021-2026) & (K Units)
Table 53. Americas Plasma-Resistant O-Rings Sales by Application (2021-2026) & (K Units)
Table 54. APAC Plasma-Resistant O-Rings Sales by Region (2021-2026) & (K Units)
Table 55. APAC Plasma-Resistant O-Rings Sales Market Share by Region (2021-2026)
Table 56. APAC Plasma-Resistant O-Rings Revenue by Region (2021-2026) & ($ millions)
Table 57. APAC Plasma-Resistant O-Rings Sales by Material Type (2021-2026) & (K Units)
Table 58. APAC Plasma-Resistant O-Rings Sales by Application (2021-2026) & (K Units)
Table 59. Europe Plasma-Resistant O-Rings Sales by Country (2021-2026) & (K Units)
Table 60. Europe Plasma-Resistant O-Rings Revenue by Country (2021-2026) & ($ millions)
Table 61. Europe Plasma-Resistant O-Rings Sales by Material Type (2021-2026) & (K Units)
Table 62. Europe Plasma-Resistant O-Rings Sales by Application (2021-2026) & (K Units)
Table 63. Middle East & Africa Plasma-Resistant O-Rings Sales by Country (2021-2026) & (K Units)
Table 64. Middle East & Africa Plasma-Resistant O-Rings Revenue Market Share by Country (2021-2026)

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Table 65. Middle East & Africa Plasma-Resistant O-Rings Sales by Material Type (2021-2026) & (K Units)
Table 66. Middle East & Africa Plasma-Resistant O-Rings Sales by Application (2021-2026) & (K Units)
Table 67. Key Market Drivers & Growth Opportunities of Plasma-Resistant O-Rings
Table 68. Key Market Challenges & Risks of Plasma-Resistant O-Rings
Table 69. Key Industry Trends of Plasma-Resistant O-Rings
Table 70. Plasma-Resistant O-Rings Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. Plasma-Resistant O-Rings Distributors List
Table 73. Plasma-Resistant O-Rings Customer List
Table 74. Global Plasma-Resistant O-Rings Sales Forecast by Region (2027-2032) & (K Units)
Table 75. Global Plasma-Resistant O-Rings Revenue Forecast by Region (2027-2032) & ($ millions)
Table 76. Americas Plasma-Resistant O-Rings Sales Forecast by Country (2027-2032) & (K Units)
Table 77. Americas Plasma-Resistant O-Rings Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. APAC Plasma-Resistant O-Rings Sales Forecast by Region (2027-2032) & (K Units)
Table 79. APAC Plasma-Resistant O-Rings Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 80. Europe Plasma-Resistant O-Rings Sales Forecast by Country (2027-2032) & (K Units)
Table 81. Europe Plasma-Resistant O-Rings Revenue Forecast by Country (2027-2032) & ($ millions)
Table 82. Middle East & Africa Plasma-Resistant O-Rings Sales Forecast by Country (2027-2032) & (K Units)
Table 83. Middle East & Africa Plasma-Resistant O-Rings Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. Global Plasma-Resistant O-Rings Sales Forecast by Material Type (2027-2032) & (K Units)
Table 85. Global Plasma-Resistant O-Rings Revenue Forecast by Material Type (2027-2032) & ($ millions)
Table 86. Global Plasma-Resistant O-Rings Sales Forecast by Application (2027-2032) & (K Units)
Table 87. Global Plasma-Resistant O-Rings Revenue Forecast by Application (2027-2032) & ($ millions)

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Table 88. Qnity Electronics, Inc. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 89. Qnity Electronics, Inc. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 90. Qnity Electronics, Inc. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 91. Qnity Electronics, Inc. Main Business
Table 92. Qnity Electronics, Inc. Latest Developments
Table 93. Greene Tweed & Co. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 94. Greene Tweed & Co. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 95. Greene Tweed & Co. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 96. Greene Tweed & Co. Main Business
Table 97. Greene Tweed & Co. Latest Developments
Table 98. Parker Hannifin Corporation Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 99. Parker Hannifin Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 100. Parker Hannifin Corporation Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 101. Parker Hannifin Corporation Main Business
Table 102. Parker Hannifin Corporation Latest Developments
Table 103. Trelleborg AB Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 104. Trelleborg AB Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 105. Trelleborg AB Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 106. Trelleborg AB Main Business
Table 107. Trelleborg AB Latest Developments
Table 108. VALQUA, LTD. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 109. VALQUA, LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 110. VALQUA, LTD. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 111. VALQUA, LTD. Main Business

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Table 112. VALQUA, LTD. Latest Developments
Table 113. NICHIAS Corporation Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 114. NICHIAS Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 115. NICHIAS Corporation Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 116. NICHIAS Corporation Main Business
Table 117. NICHIAS Corporation Latest Developments
Table 118. Eagle Industry Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 119. Eagle Industry Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 120. Eagle Industry Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 121. Eagle Industry Co., Ltd. Main Business
Table 122. Eagle Industry Co., Ltd. Latest Developments
Table 123. AIR WATER MACH INC. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 124. AIR WATER MACH INC. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 125. AIR WATER MACH INC. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 126. AIR WATER MACH INC. Main Business
Table 127. AIR WATER MACH INC. Latest Developments
Table 128. IDEX Corporation Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 129. IDEX Corporation Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 130. IDEX Corporation Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 131. IDEX Corporation Main Business
Table 132. IDEX Corporation Latest Developments
Table 133. Freudenberg SE Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 134. Freudenberg SE Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 135. Freudenberg SE Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 136. Freudenberg SE Main Business
Table 137. Freudenberg SE Latest Developments
Table 138. Angst+Pfister Group Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 139. Angst+Pfister Group Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 140. Angst+Pfister Group Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 141. Angst+Pfister Group Main Business
Table 142. Angst+Pfister Group Latest Developments
Table 143. Ceetak Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 144. Ceetak Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 145. Ceetak Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 146. Ceetak Ltd. Main Business
Table 147. Ceetak Ltd. Latest Developments
Table 148. Maxmold Polymer Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 149. Maxmold Polymer Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 150. Maxmold Polymer Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 151. Maxmold Polymer Co., Ltd. Main Business
Table 152. Maxmold Polymer Co., Ltd. Latest Developments
Table 153. MFC Sealing Technology Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 154. MFC Sealing Technology Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 155. MFC Sealing Technology Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 156. MFC Sealing Technology Co., Ltd. Main Business
Table 157. MFC Sealing Technology Co., Ltd. Latest Developments
Table 158. GE MAO RUBBER INDUSTRIAL CO., LTD. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 159. GE MAO RUBBER INDUSTRIAL CO., LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 160. GE MAO RUBBER INDUSTRIAL CO., LTD. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 161. GE MAO RUBBER INDUSTRIAL CO., LTD. Main Business
Table 162. GE MAO RUBBER INDUSTRIAL CO., LTD. Latest Developments
Table 163. KTSEAL CO., LTD. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 164. KTSEAL CO., LTD. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 165. KTSEAL CO., LTD. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 166. KTSEAL CO., LTD. Main Business
Table 167. KTSEAL CO., LTD. Latest Developments
Table 168. Shanghai Xinmi Technology Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 169. Shanghai Xinmi Technology Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 170. Shanghai Xinmi Technology Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 171. Shanghai Xinmi Technology Co., Ltd. Main Business
Table 172. Shanghai Xinmi Technology Co., Ltd. Latest Developments
Table 173. Boilpeak Seals Technology (Jiangsu) Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 174. Boilpeak Seals Technology (Jiangsu) Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 175. Boilpeak Seals Technology (Jiangsu) Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 176. Boilpeak Seals Technology (Jiangsu) Co., Ltd. Main Business
Table 177. Boilpeak Seals Technology (Jiangsu) Co., Ltd. Latest Developments
Table 178. Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors
Table 179. Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 180. Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 181. Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Main Business
Table 182. Daikin Tsingyan Advanced Technologies (Huizhou) Co., Ltd. Latest Developments
Table 183. Sichuan Dowhon New Materials Co., Ltd. Basic Information, Plasma-Resistant O-Rings Manufacturing Base, Sales Area and Its Competitors

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Table 184. Sichuan Dowhon New Materials Co., Ltd. Plasma-Resistant O-Rings Product Portfolios and Specifications
Table 185. Sichuan Dowhon New Materials Co., Ltd. Plasma-Resistant O-Rings Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 186. Sichuan Dowhon New Materials Co., Ltd. Main Business
Table 187. Sichuan Dowhon New Materials Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Plasma-Resistant O-Rings
Figure 2. Plasma-Resistant O-Rings Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Plasma-Resistant O-Rings Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global Plasma-Resistant O-Rings Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Plasma-Resistant O-Rings Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Plasma-Resistant O-Rings Sales Market Share by Country/Region (2025)
Figure 10. Plasma-Resistant O-Rings Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of FFKM O-Rings
Figure 12. Product Picture of Plasma-Resistant FKM O-Rings
Figure 13. Product Picture of Others
Figure 14. Global Plasma-Resistant O-Rings Sales Market Share by Material Type in 2026
Figure 15. Global Plasma-Resistant O-Rings Revenue Market Share by Material Type (2021-2026)
Figure 16. Product Picture of Static O-Rings
Figure 17. Product Picture of Dynamic O-Rings
Figure 18. Global Plasma-Resistant O-Rings Sales Market Share by Sealing Mode in 2026
Figure 19. Global Plasma-Resistant O-Rings Revenue Market Share by Sealing Mode (2021-2026)
Figure 20. Product Picture of Below 250°C
Figure 21. Product Picture of 250–300°C
Figure 22. Product Picture of Above 300°C
Figure 23. Global Plasma-Resistant O-Rings Sales Market Share by Temperature Rating in 2026
Figure 24. Global Plasma-Resistant O-Rings Revenue Market Share by Temperature Rating (2021-2026)
Figure 25. Plasma-Resistant O-Rings Consumed in Semiconductor Manufacturing
Figure 26. Global Plasma-Resistant O-Rings Market: Semiconductor Manufacturing

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(2021-2026) & (K Units)
Figure 27. Plasma-Resistant O-Rings Consumed in Flat Panel Display Manufacturing
Figure 28. Global Plasma-Resistant O-Rings Market: Flat Panel Display Manufacturing (2021-2026) & (K Units)
Figure 29. Plasma-Resistant O-Rings Consumed in Photovoltaic Manufacturing
Figure 30. Global Plasma-Resistant O-Rings Market: Photovoltaic Manufacturing (2021-2026) & (K Units)
Figure 31. Plasma-Resistant O-Rings Consumed in LED and Compound Semiconductor Manufacturing
Figure 32. Global Plasma-Resistant O-Rings Market: LED and Compound Semiconductor Manufacturing (2021-2026) & (K Units)
Figure 33. Plasma-Resistant O-Rings Consumed in Others
Figure 34. Global Plasma-Resistant O-Rings Market: Others (2021-2026) & (K Units)
Figure 35. Global Plasma-Resistant O-Rings Sale Market Share by Application (2025)
Figure 36. Global Plasma-Resistant O-Rings Revenue Market Share by Application in 2025
Figure 37. Plasma-Resistant O-Rings Sales by Company in 2025 (K Units)
Figure 38. Global Plasma-Resistant O-Rings Sales Market Share by Company in 2025
Figure 39. Plasma-Resistant O-Rings Revenue by Company in 2025 ($ millions)
Figure 40. Global Plasma-Resistant O-Rings Revenue Market Share by Company in 2025
Figure 41. Global Plasma-Resistant O-Rings Sales Market Share by Geographic Region (2021-2026)
Figure 42. Global Plasma-Resistant O-Rings Revenue Market Share by Geographic Region in 2025
Figure 43. Americas Plasma-Resistant O-Rings Sales 2021-2026 (K Units)
Figure 44. Americas Plasma-Resistant O-Rings Revenue 2021-2026 ($ millions)
Figure 45. APAC Plasma-Resistant O-Rings Sales 2021-2026 (K Units)
Figure 46. APAC Plasma-Resistant O-Rings Revenue 2021-2026 ($ millions)
Figure 47. Europe Plasma-Resistant O-Rings Sales 2021-2026 (K Units)
Figure 48. Europe Plasma-Resistant O-Rings Revenue 2021-2026 ($ millions)
Figure 49. Middle East & Africa Plasma-Resistant O-Rings Sales 2021-2026 (K Units)
Figure 50. Middle East & Africa Plasma-Resistant O-Rings Revenue 2021-2026 ($ millions)
Figure 51. Americas Plasma-Resistant O-Rings Sales Market Share by Country in 2025
Figure 52. Americas Plasma-Resistant O-Rings Revenue Market Share by Country (2021-2026)
Figure 53. Americas Plasma-Resistant O-Rings Sales Market Share by Material Type (2021-2026)

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Figure 54. Americas Plasma-Resistant O-Rings Sales Market Share by Application (2021-2026)
Figure 55. United States Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 56. Canada Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 57. Mexico Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 58. Brazil Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 59. APAC Plasma-Resistant O-Rings Sales Market Share by Region in 2025
Figure 60. APAC Plasma-Resistant O-Rings Revenue Market Share by Region (2021-2026)
Figure 61. APAC Plasma-Resistant O-Rings Sales Market Share by Material Type (2021-2026)
Figure 62. APAC Plasma-Resistant O-Rings Sales Market Share by Application (2021-2026)
Figure 63. China Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 64. Japan Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 65. South Korea Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 66. Southeast Asia Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 67. India Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 68. Australia Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 69. China Taiwan Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 70. Europe Plasma-Resistant O-Rings Sales Market Share by Country in 2025
Figure 71. Europe Plasma-Resistant O-Rings Revenue Market Share by Country (2021-2026)
Figure 72. Europe Plasma-Resistant O-Rings Sales Market Share by Material Type (2021-2026)
Figure 73. Europe Plasma-Resistant O-Rings Sales Market Share by Application (2021-2026)
Figure 74. Germany Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 75. France Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 76. UK Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 77. Italy Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 78. Russia Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 79. Middle East & Africa Plasma-Resistant O-Rings Sales Market Share by Country (2021-2026)
Figure 80. Middle East & Africa Plasma-Resistant O-Rings Sales Market Share by

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Material Type (2021-2026)
Figure 81. Middle East & Africa Plasma-Resistant O-Rings Sales Market Share by Application (2021-2026)
Figure 82. Egypt Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 83. South Africa Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 84. Israel Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 85. Turkey Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 86. GCC Countries Plasma-Resistant O-Rings Revenue Growth 2021-2026 ($ millions)
Figure 87. Manufacturing Cost Structure Analysis of Plasma-Resistant O-Rings in 2026
Figure 88. Manufacturing Process Analysis of Plasma-Resistant O-Rings
Figure 89. Industry Chain Structure of Plasma-Resistant O-Rings
Figure 90. Channels of Distribution
Figure 91. Global Plasma-Resistant O-Rings Sales Market Forecast by Region (2027-2032)
Figure 92. Global Plasma-Resistant O-Rings Revenue Market Share Forecast by Region (2027-2032)
Figure 93. Global Plasma-Resistant O-Rings Sales Market Share Forecast by Material Type (2027-2032)
Figure 94. Global Plasma-Resistant O-Rings Revenue Market Share Forecast by Material Type (2027-2032)
Figure 95. Global Plasma-Resistant O-Rings Sales Market Share Forecast by Application (2027-2032)
Figure 96. Global Plasma-Resistant O-Rings Revenue Market Share Forecast by Application (2027-2032)

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