

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

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Abstracts

The global Plastic Parts for Semiconductor Equipment market size is predicted to grow from US\$ 3602 million in 2025 to US\$ 6129 million in 2032; it is expected to grow at a CAGR of 8.2% from 2026 to 2032.

Plastic Parts for Semiconductor Equipment refers to polymer-based components and subassemblies used in semiconductor equipment and wafer-fab utility systems where corrosion resistance, ultra-cleanliness, low extractables/low particles, dimensional stability, ESD control, and (in some modules) low outgassing are required. In industry practice, this category is dominated by fluoropolymers for wet/chemical service—PFA parts, PTFE parts, PVDF parts—and high-performance engineering plastics for high-wear/high-temperature/precision/vacuum service—PEEK parts, PPS parts, PI (polyimide/PAI) parts—supplemented by General Engineering Plastics (GEPs) for non-wetted covers, frames, and general mechanical fixtures. The “semiconductor-grade” boundary is typically defined by performance and qualification requirements for polymer materials/components used in ultrapure water and chemical distribution from bulk supply through facility distribution to process equipment; SEMI’s polymer specification for UPW and liquid chemical distribution explicitly includes purity, mechanical requirements, and packaging/traceability requirements, which is the prevailing qualification logic for many UHP polymer parts used around fab chemical delivery.

Across the applications, polymer selection maps to the dominant stressors: Cleaning & Wet Process Tools and Wafer Fab Facilities consume the highest volumes of fluoropolymer plastics in wetted paths (tanks, piping, fittings, valves, manifolds, filter housings) because wet benches and tanks are commonly specified in PP/PVDF/PFA/PTFE/ECTFE families depending on chemical set and temperature window. CMP Equipment is one of the most plastics-intensive tool categories due to

abrasive slurry + reactive chemistries; the critical consumable is the retainer/retaining ring, where typical materials include PEEK and PPS (and, in some ecosystems, PET), selected for abrasion and chemical resistance. Plating & Electrochemical Tools, Etch, and parts of Deposition (CVD/PVD/ALD/Epi) also pull UHP fluoropolymers in chemical delivery and chamber-adjacent fixtures, while PI/PAI and related high-temperature/vacuum-capable plastics are common in dry/vacuum zones where ultra-low outgassing is needed. Lithography Track/Coater & Developer, Metrology & Inspection, and Wafer Handling/EFEM/FOUP & Carriers rely heavily on polymer-based handling interfaces (FOUPs/carriers, end-effectors/contact parts, ESD-managed plastics) and UHP chemical connections (e.g., PFA fittings engineered for leak-free, low dead-volume ultrapure fluid service).

The North American market for Plastic Parts for Semiconductor Equipment was valued at US\$ 1,004 million in 2025 and is projected to reach US\$ 1,666 million by 2032, at a CAGR of 7.78% from 2026 to 2032.

The European market for Plastic Parts for Semiconductor Equipment was valued at \$ 528 million in 2025 and is projected to total US\$ 776 million by 2032, at a CAGR of 6.0% from 2026 to 2032.

The China market for Plastic Parts for Semiconductor Equipment was valued at \$ 613 million in 2025 and is projected to total US\$ 1271 million by 2032, at a CAGR of 10.98% from 2026 to 2032.

The Japan market for Plastic Parts for Semiconductor Equipment was valued at \$ 666.68 million in 2025 and is projected to total US\$ 995 million by 2032, at a CAGR of 6.24% from 2026 to 2032.

The South Korea market for Plastic Parts for Semiconductor Equipment was valued at \$ 361 million in 2025 and is projected to total US\$ 584 million by 2032, at a CAGR of 7.29% from 2026 to 2032.

The global key companies in the Plastic Parts for Semiconductor Equipment market include Entegris, Pall Corporation, Shin-Etsu Polymer, PILLAR Corporation, Parker Hannifin, Gudeng Precision, Nichias Corporation, Daikin, Willbe S&T, GEM? Group, SMC, Miraial Co.,Ltd, R?chling Industrial, SIMONA AG and Saint-Gobain, etc. In 2025, the ten largest players accounted for approximately 59.85% of revenue.

Plastic Parts for Semiconductor Equipment is currently in a structural upcycle driven by

both (i) sustained fab investment and (ii) rising wet-process/material intensity per wafer. SEMI projects front-end fab equipment spending to reach \$110B in 2025 (sixth consecutive year of growth since 2020), while total semiconductor manufacturing equipment sales are projected to rise further toward a record \$156B by 2027—expanding the global installed base that continuously consumes polymer components (UHP fluid paths, CMP polymers, wafer-handling plastics, facility plastics, etc.). In materials, SEMI's latest outlook shows wet chemicals continuing to expand (e.g., \$3.7B in 2025 and \$4.1B by 2026), mechanically pulling through more UHP polymer tubing/fittings/valves, filtration housings, tanks/liners, and tool-side chemical modules across “bulk ? facility distribution ? point-of-use.” The industry's current baseline requirement is shifting from “engineering plastics availability” to qualification-grade performance and documentation: standards like SEMI F57 codify minimum requirements for UHP polymer materials/components in UPW and liquid chemical distribution, and leading suppliers increasingly market copy-exact / tighter process controls (material purity, stress control, dimensional stability, cleaning/packaging, traceability) as a prerequisite to win tool OEM and fab approvals.

Looking forward, the dominant trends and demand drivers are: (1) higher purity + lower defect budgets, which accelerate adoption of semiconductor-grade fluoropolymers and more rigorous contamination controls; (2) more ESD-managed and safety-engineered polymer systems, especially for solvent and non-conductive chemical lines—e.g., conductive-path PFA tubing/fittings designed to dissipate charge buildup while maintaining chemical purity; (3) AI/HBM-led capex and technology complexity, which lifts utilization of CMP/wet modules and increases replacement cycles for wear/consumable plastics in carrier heads, wet benches, and facility chemical distribution (supported by SEMI's raised equipment outlook and strong back-end recovery); (4) supplier localization + standards alignment, where regions (notably Asia) push domestic qualification of UHP polymer components to reduce lead-time and geopolitical risk while converging on SEMI-like specs; and (5) PFAS/fluoropolymer regulatory scrutiny becoming a strategic constraint, forcing the industry to invest in emissions control, compliance documentation, and “essential use” arguments for fluoropolymer-dependent applications (the EEA briefing highlights PFAS polymer impact/knowledge gaps and links to ongoing EU policy proposals).

LPI (LP Information)' newest research report, the “Plastic Parts for Semiconductor Equipment Industry Forecast” looks at past sales and reviews total world Plastic Parts for Semiconductor Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Plastic Parts for Semiconductor Equipment sales for 2026 through 2032. With Plastic 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 Plastic Parts for Semiconductor Equipment industry.

This Insight Report provides a comprehensive analysis of the global Plastic 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 Plastic 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 Plastic Parts for Semiconductor Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Plastic Parts for Semiconductor Equipment and breaks down the forecast by Plastic 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 Plastic Parts for Semiconductor Equipment.

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

Segmentation by Plastic Type:

PFA Parts

PEEK Parts

PTFE Parts

General Engineering Plastics (GEPs)

PPS Parts

PVDF Parts

PI (Polyimide/PAI) Parts

Others

Segmentation by Product Type:

Plastic Valves, Fitting and Tubing

CMP Retainer Ring

Wafer Carriers

Others

Segmentation by End Use:

Semiconductor Equipment (OEM)

Wafer Fab Facilities

Segmentation by Application:

Cleaning & Wet Process Tools

CMP Equipment

Plating & Electrochemical Tools

Etch Equipment

Deposition Equipment (CVD/PVD/ALD/Epi)

Lithography Track/Coater & Developer

Metrology & Inspection Equipment

Wafer Handling/EFEM/FOUP & Carriers

Wafer Fab Facilities

Others

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.

Entegris

Pall Corporation

Shin-Etsu Polymer

PILLAR Corporation

Parker Hannifin

KITZ SCT

White Knight (Graco)

IWAKI

Ensinger Group

Nichias Corporation

Sun Fluoro System

Daikin

Yodogawa Hu-Tech

Yasojima Proceed

PBI Advanced Materials

Miraial Co.,Ltd

Dainichi Shoji K.K.

Mitsubishi Chemical

CKD Corporation

SMC

Junkosha Inc.

Asahi/America, Inc.

Fit-Line Global

C-Hawk Technology, Inc.

Pexco

DuPont

Röchling Industrial

Saint-Gobain

SIMONA AG

SAT Group

GEM? Group

Porvair Filtration Group

Willbe S&T

Cnus Co., Ltd.

Wooam Super Polymer

Chemiflon

ENIB Co., Ltd.

EPK, Co., Ltd

IST Co., Ltd.

3SLine Co.,Ltd

3S Korea

CALITECH

Chuang King Enterprise

Gudeng Precision

ESI Products Inc.

Shen-Yueh Technology

Niche Applied Materials Co., Ltd.

Duratek

AKT Components

UIS Technologies

Jiangsu OKFLON Precision Manufacturing

Xiamen Baoshili Dustless Technology

HPRAY (Changzhou) Clean System Technology

Changzhou Junhang High Performance Composite Materials

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