

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

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Abstracts

The global Precision Parts for Semiconductor Equipment market size is predicted to grow from US\$ 45311 million in 2025 to US\$ 75101 million in 2032; it is expected to grow at a CAGR of 7.2% from 2026 to 2032.

Precision parts for semiconductor equipment refer to the critical components, functional modules and subsystems that support process performance, tool stability, contamination control, vacuum control, fluid delivery, motion control, thermal control, optical imaging, process monitoring and long-term maintenance of semiconductor manufacturing tools. Key technical attributes include high cleanliness, high precision, high reliability, corrosion resistance, plasma resistance, vacuum sealing, low particle generation and long operating life. The report classifies the market by mechanical parts, gas/liquid/vacuum systems, mechatronic parts, electrical parts, instrumentation, optical parts and other critical components, and further analyzes demand by equipment application.

Market growth is mainly driven by AI, HBM, advanced logic, advanced packaging, fab utilization recovery, increasing tool complexity and regional supply-chain restructuring. On the supply side, leading players are expanding around advanced optics, vacuum valves, gas/liquid delivery, RF power, precision ceramic/quartz/silicon parts, sensing and control modules. SEMI forecasts total semiconductor manufacturing equipment sales to reach US\$133 billion in 2025, US\$145 billion in 2026 and US\$156 billion in 2027, with WFE sales projected at US\$115.7 billion in 2025, supported by AI-related DRAM, HBM, leading-edge logic and advanced packaging investments.

The global competitive landscape has developed into a three-layer structure: platform-type equipment and system leaders, specialized oligopolies in key component

categories, and regional substitution players. Representative companies include ZEISS, ASML, Applied Materials, Lam Research, Atlas Copco, MKS, UCT, Entegris, VAT, HORIBA, Advanced Energy, Brooks, Ebara, Kyocera, NGK, Ferrotec, Fujikin, Pall, SMC and TOTO Advanced Ceramics. Representative Chinese companies include Fuchuang Precision, Konfoong Materials International, Pioneer Precision, Huacheng Electronics, Kema Technology, Xinlai Yingcai, Chengdu Chaochun, Zhenbao Technology and Zhicheng Semiconductor; the final company list will be subject to the full report. In 2025, ZEISS, ASML, Applied Materials, Lam Research and Atlas Copco together accounted for about 33.8% of the market, while the top ten companies accounted for about 49%, showing that value is concentrated in leading platforms and category specialists. ASML states that approximately 80% of its bill of materials is sourced from a global supplier network, while VAT reports a 70% share in semiconductor and semiconductor-related vacuum valves, confirming the high specialization and customer stickiness of critical component segments.

By product type, mechanical parts remained the largest category in 2025, accounting for about 29.98% of the market, followed by gas/liquid/vacuum systems at 17.66%, instrumentation at 14.37%, and optical parts at 14.11%. This shows that the industry is not a single structural-component market, but a compound ecosystem built on precision structures, high-cleanliness fluid and vacuum control, high-end instrumentation, advanced optics, automation and power control. By application, thin-film deposition equipment and etch equipment together represented about 47.78% of demand in 2025, while lithography equipment accounted for about 13.52% and inspection/metrology equipment for about 12.18%. Front-end advanced process equipment remains the key value center, while advanced packaging, test and heterogeneous integration are increasing the importance of back-end-related precision components.

By company headquarters, North America, Europe and Japan accounted for about 36.68%, 27.47% and 24.30% of the global market in 2025, respectively, representing nearly 88.5% in total and indicating that high-end control remains concentrated in US, European and Japanese supplier ecosystems. Chinese-headquartered suppliers increased their share from 3.65% in 2021 to 5.88% in 2025 and are projected to reach 9.01% by 2032. By demand region, North America, China and Japan are the core consumption markets. China's demand reached approximately US\$5.49 billion in 2025 and is projected to reach US\$12.28 billion by 2032, implying a CAGR of about 11.15% during 2026-2032. Regional opportunities are linked to China's domestic tool adoption, Taiwan's leading-edge logic expansion, Korea's HBM and memory capex, Japan's materials and component ecosystem, US and European manufacturing reshoring, and Southeast Asia's packaging/test and mature-node capacity expansion.

The upstream value chain covers high-purity metals, advanced ceramics, quartz, silicon, sapphire, carbon materials, engineering plastics, sealing materials, specialty alloys, precision machining, surface treatment, coating, cleaning, testing and clean packaging. Midstream products include vacuum valves, pumps, MFCs, gas and liquid lines, filters, RF power supplies, motion stages, ceramic/quartz/silicon parts, optical modules, sensors, thermal-control modules, mechanical structures and integrated functional modules. Downstream direct customers are semiconductor equipment OEMs, while end demand comes from foundries, IDMs, memory manufacturers, OSATs and advanced packaging customers. Value is concentrated in areas with high certification barriers, strong process coupling, high reliability requirements, strict cleanliness standards and long-term service capability. Future supply chains are expected to shift from single-product delivery toward platform-level validation, modular supply, regional backup and local rapid-response service.

Policy support across major economies is increasingly framed around semiconductor manufacturing, equipment, materials, critical components and supply-chain resilience. In China, the market is moving toward coordinated development of equipment breakthroughs, component matching, testing and validation, and industrial-cluster formation. Demand growth is likely to be concentrated in etch, deposition, cleaning, CMP, inspection/metrology and the corresponding vacuum systems, gas/liquid flow paths, RF power supplies, motion platforms, precision mechanical parts, ceramic/quartz parts, and sensing and control modules. Key barriers include process know-how, material purity, precision machining, cleanliness control, plasma resistance, long-term reliability, tool-platform certification, customer qualification cycles, batch consistency and global service capability. Major challenges include advanced optics, top-tier precision instrumentation, high-end vacuum and control technologies, core software algorithms, cross-border supply-chain compliance and pricing pressure.

Over the next several years, the global precision parts for semiconductor equipment industry is expected to evolve along four lines: market expansion, high-end concentration, regional restructuring and rising Chinese participation. AI servers, HBM, advanced logic, sub-2nm technology, advanced packaging and regional mature-node expansion will continue to increase equipment complexity and component value. The market is therefore more likely to become more structured rather than more fragmented: platform leaders will dominate system-level ecosystems, specialized component leaders will strengthen oligopolistic positions, and regional suppliers will grow through local validation and supply-chain security demand. For Chinese suppliers, the most realistic opportunities lie in vacuum, fluid control, precision process parts, ceramic/quartz/silicon

parts, selected mechatronic modules and advanced-packaging-related components, with gradual movement from local second-source suppliers to globally qualified alternatives.

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

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

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

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

Segmentation by Product Type:

Mechanical and Structural Components

Gas, Liquid and Vacuum Control Components

Mechatronics and Motion Control Components

Electrical and Power Components

Instrumentation, Sensors and Process Control Components

Optical and Photonics Components

Other Precision Components and Services

Segmentation by Material Type:

Metal-Based Components

Ceramic Components

Quartz Components

Silicon / SiC Components

Graphite Components

Polymer / Sealing Components

Optical Glass / Crystal Components

Other

Segmentation by Wafer Size:

300mm Wafer Equipment Parts

200mm Wafer Equipment Parts

150mm and Below Equipment Parts

Segmentation by Equipment Application:

Etch Equipment

Deposition Equipment

Lithography and Track Equipment

Ion Implantation Equipment

CMP Equipment

Wet Process Equipment

Thermal Processing Equipment

Inspection / Metrology Equipment

Advanced Packaging 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.

ZEISS

MKS Instruments

Atlas Copco (Leybold, and Edwards Vacuum)

NGK Insulators

Applied Materials, Inc. (AMAT)

Lam Research

Advanced Energy

HORIBA

VAT Vakuumventile

Entegris

Ichor Systems

Ultra Clean Holdings Inc. (UCT)

ASML

Pall

Camfil

Ebara Corporation

SHINKO

TOTO Advanced Ceramics

Kyocera

Ferrotec

Schunk Xycarb Technology

MiCo Ceramics Co., Ltd.

Morgan Advanced Materials

Niterra Co., Ltd.

Coorstek

Fujikin

Parker

CKD Corporation

Daikin

Foxsemicon Integrated Technology

KITZ SCT

Swagelok

GEM?

Nippon Seisen

SMC Corporation

XP Power (Comdel)

Trumpf

RORZE Corporation

Kawasaki Robotics

DAIHEN Corporation

Hirata Corporation

Yaskawa

Pfeiffer Vacuum GmbH

LOT Vacuum

GST (Global Standard Technology)

Unisem

CSK

JEL Corporation

Advanced Thermal Sciences Corporation (ATS)

Shinwa Controls

Brooks Automation

Tosoh Quartz Corporation

Kashiyama Industries

HandyTube

Dockweiler

Kuze

Watlow (CRC)

Durex Industries

Miraial Co., Ltd.

Sevenstar

Suzhou KemaTek, Inc.

Sinfonia Technology

Konfoong Materials International

Canon ANELVA

Sprint Precision Technologies Co., Ltd

KINGLAI

Shenyang Fortune Precision Equipment Co., Ltd

Comet PCT

Tolerance Technology (Jiangsu)

NHK Spring

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