

Global Silicon Components for Etching Market Growth 2026-2032

<https://marketpublishers.com/r/GBDCE8493C75EN.html>

Date: July 2026

Pages: 181

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

ID: GBDCE8493C75EN

Abstracts

The global Silicon Components for Etching market size is predicted to grow from US\$ 2006 million in 2025 to US\$ 4477 million in 2032; it is expected to grow at a CAGR of 11.5% from 2026 to 2032.

Silicon components for etching are high-purity silicon consumable components used inside semiconductor plasma dry-etch chambers, mainly including Silicon Electrodes and Silicon Rings. Silicon Electrodes generally function as upper electrodes, gas distribution plates or showerhead-type components, supporting process-gas distribution, RF/plasma coupling and etch-uniformity control; Silicon Rings, including edge rings, focus rings and confinement rings, are positioned around the wafer edge or chamber boundary to stabilize plasma distribution, improve edge uniformity, reduce particle risks and protect underlying chamber components.

The product structure of the industry is characterized by stable segmentation between silicon electrodes and silicon rings, but the value mix is shifting toward 12-inch wafer platforms and higher-specification consumables. According to the report dataset, Silicon Electrodes accounted for 55.44% of global revenue in 2025, while Silicon Rings accounted for 44.56%. By wafer size, 12-inch Si parts dominate the market, increasing from 83.57% of global revenue in 2025 to an estimated 91.80% in 2032, reflecting the concentration of advanced logic, advanced memory and mainstream 300 mm mature-node fabs on 12-inch platforms. Technically, the industry requires high-purity silicon materials, resistivity and crystal-orientation control, precision hole drilling, CNC machining, lapping, polishing, ultra-clean cleaning, particle control and strict dimensional consistency. Silfex highlights exact hole drilling, CNC machining, lapping and polishing for silicon electrodes, while Hana Materials is described as producing silicon electrodes and rings for semiconductor dry etching and supplying essential

components to global semiconductor equipment companies.

The application base of silicon components for etching is concentrated in plasma dry etching for logic, memory, power devices, analog ICs, MEMS, sensors and selected advanced-packaging front-end-related processes. Demand is strongest in dielectric etch, conductor etch, oxide etch, silicon etch, high-aspect-ratio 3D NAND etch, DRAM etch and advanced logic etch, where chamber materials directly influence plasma stability, etch profile, particle generation and wafer yield. Customer demand is still led by equipment OEMs, which represented 65.84% of global revenue in 2025, because silicon electrodes and rings are highly tool-specific and must match the chamber design, RF configuration and process recipe. However, direct Wafer Fab procurement is rising, from 34.16% in 2025 to an estimated 37.83% in 2032, as fabs increasingly focus on spare-parts security, second-source qualification, process ownership and total cost of ownership. The industry therefore has limited catalogue-style distribution; most sales are project-based, drawing-based and qualification-driven.

Policy and supply-chain factors are becoming increasingly important for the industry. Although silicon electrodes and silicon rings are rarely listed as standalone policy products, they fall within the practical scope of semiconductor equipment parts, critical materials and wafer-fabrication consumables. In the United States, CHIPS for America provides about US\$50 billion to strengthen semiconductor R&D and manufacturing; in Europe, the Chips Act aims to increase Europe's global share of cutting-edge semiconductors to 20%; in China, qualifying IC design, manufacturing, equipment, materials, packaging and testing enterprises may benefit from a 15% super input VAT credit during 2023-2027. At the same time, U.S. Section 301 tariff actions on China-origin wafers and polysilicon, together with export-control policy, reinforce regionalization, origin compliance and dual-sourcing requirements. These policy trends are pushing the industry toward localized production, OEM-approved supply chains, regional inventory and closer cooperation among equipment makers, wafer fabs and qualified consumable suppliers.

The competitive landscape remains highly concentrated and strongly tied to etch equipment OEM platforms and wafer-fab qualification systems. Silfex Inc. remained the global leader with a 50% revenue share in 2025, followed by Hana Materials, Worldex, CMTX, CoorsTek, KC Parts Tech, TKG Solmics, Mitsubishi Materials, RS Technologies and other regional suppliers. Korean and Chinese suppliers are increasing their presence, but most new entrants remain constrained by qualification cycles, process stability requirements and customer-specific chamber know-how. By production region, North America remained the largest manufacturing base with 46% of global output

share in 2025, but its share is expected to decline to 42% by 2032; China's production share is expected to rise from 10% in 2025 to 18% in 2032, making it the fastest-growing production region. This reflects the industry's transition from a U.S.-led, OEM-integrated supply base toward a more diversified structure involving Korea, Japan, China and other Asian suppliers, while the high-end market remains difficult to penetrate without proven OEM or wafer-fab qualification records. The global silicon components for etching market has entered a new growth phase driven by AI, advanced logic, advanced memory, 300 mm fab investment, regional fab localization and increasing etch-step intensity. Demand growth should not be modeled only by wafer starts; it is better understood as a function of etch-tool installed base, fab utilization, etch-step density, consumable replacement cycles, and 12-inch product penetration. SEMI projects worldwide 300 mm fab equipment spending to increase 18% to US\$133 billion in 2026 and 14% to US\$151 billion in 2027, driven by AI chips for data centers and edge devices, semiconductor self-sufficiency and localized supply-chain restructuring. These factors will continue to support demand for high-purity silicon electrodes and silicon rings, while also raising technical barriers in purity, lifetime, surface control, particle performance and customer qualification.

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

This Insight Report provides a comprehensive analysis of the global Silicon Components for Etching 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 Silicon Components for Etching portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Silicon Components for Etching market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Silicon Components for Etching and breaks down the forecast by Type, by Customer Type, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced

view of the current state and future trajectory in the global Silicon Components for Etching.

This report presents a comprehensive overview, market shares, and growth opportunities of Silicon Components for Etching market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Silicon Electrode

Silicon Ring

Segmentation by Wafer Size:

12 Inch Silicon Parts

8&6 Inch Silicon Parts

Segmentation by Customer Type:

OEM

Wafer Fab

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

Silfex Inc.

Hana Materials Inc.

Worldex Industry & Trading Co., Ltd.

Mitsubishi Materials

CoorsTek

SiFusion

KC Parts Tech., Ltd.

RS Technologies Co., Ltd.

ThinkonSemi (Fujian Dynafine)

Techno Quartz Inc.

Chongqing Genori Technology Co., Ltd

Ruijixinsheng Electronic Technology (WuXi) Co., Ltd

One Semicon Co.,Ltd

CMTX Co.,Ltd

BCnC Co., LTD.

K-max

DS Techno

Ronda Semiconductor

SICREAT(Suzhou) Semitech Co.,Ltd.

TKG Solmics

KFMI

Beijing YESEMI

Wuxi Naskai Semiconductor Technology

Yangzhou Lattice Semiconductor

Chongqing Xinhui Material Technology

Alchemist

Wuhu Tongchao Precision Machinery

Anhui Sixiang Semiconductor Materials Technology

Zhejiang Yuanxin Semiconductor Materials

Forcera Materials

Key Questions Addressed in this Report

What is the 10-year outlook for the global Silicon Components for Etching market?

What factors are driving Silicon Components for Etching market growth, globally and by region?

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

How do Silicon Components for Etching market opportunities vary by end market size?

How does Silicon Components for Etching break out by Type, by Customer Type?

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