

Global Silicon Parts for Etching Market Growth 2026-2032

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Abstracts

The global Silicon Parts 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 Parts for Etching in this report are defined under a narrow semiconductor-manufacturing scope as high-purity silicon consumable components used inside plasma dry-etch process chambers, mainly including Silicon Electrodes and Silicon Rings. Silicon Electrodes generally function as upper electrodes, gas distribution plates or showerhead-type components, supporting gas flow distribution, RF/plasma coupling and etch uniformity control. Silicon Rings include edge rings, focus rings, confinement rings, shield rings and related ring-type components located around the wafer edge or chamber boundary, where they support plasma confinement, wafer-edge uniformity, particle control and protection of underlying chamber components. Etching is one of the core pattern-transfer processes in wafer fabrication, selectively removing films and materials from the wafer to form increasingly small and complex chip structures; Lam Research describes reactive ion etching and other etch technologies as essential for building high-aspect-ratio, narrow, wide and near-atomic-scale features. Silfex also identifies silicon electrodes and silicon rings as precision silicon components for plasma etch chambers, with silicon electrodes relying on precise gas-hole drilling, CNC machining, lapping and polishing, and silicon rings contributing to controlled etch performance and chamber stability.

The product structure of the global Silicon Parts for Etching market is relatively stable, but the value mix is moving toward 12-inch, high-precision and advanced-chamber applications. According to the report dataset, Silicon Electrodes account for slightly more than half of total market revenue, rising from 55.33% in 2021 to 55.44% in 2025

and remaining around 55.84% by 2032; Silicon Rings account for the remaining 44%?46%, with a 2025 share of 44.56% and an estimated 2032 share of 44.16%. By wafer size, the 12-inch segment is the dominant growth engine, increasing from 78.87% of global revenue in 2021 to 83.57% in 2025 and an estimated 91.80% by 2032, reflecting the concentration of advanced logic, advanced memory, mainstream 300 mm mature-node production and high-utilization fabs on 12-inch platforms. The 8-inch and 6-inch segment remains relevant for power devices, analog ICs, MEMS, sensors and specialty processes, but its revenue share is expected to decline structurally as 300 mm capacity dominates incremental fab investment. By customer type, OEMs remain the primary channel, representing 65.84% of global revenue in 2025, but direct Wafer Fab demand is rising from 28.59% in 2021 to 34.16% in 2025 and an estimated 37.83% by 2032, indicating that fabs are placing greater emphasis on spare-parts security, second-source qualification, lifecycle cost and process consumable control. Lam notes that every wafer undergoes many etching steps before electronic circuits are formed and connected, and that etching is critical for complex AI-era device structures, which supports the long-term demand base for silicon electrodes and silicon rings.

The manufacturing technology of Silicon Parts for Etching has moved beyond conventional precision machining and is increasingly defined by the ability to match specific plasma chambers, RF power conditions, gas-flow fields, edge-field environments and customer process windows. For Silicon Electrodes, the main technical barriers include high-purity single-crystal or polycrystalline silicon material selection, resistivity control, precision gas-hole drilling, low-damage hole-wall processing, flatness, surface roughness, dimensional accuracy, metal contamination control, ultra-clean cleaning and particle-free packaging. For Silicon Rings, the main technical barriers include large-diameter ring machining, inner/outer diameter tolerance, thickness uniformity, edge-profile design, plasma erosion resistance, particle control, and compatibility with ESC, focus ring, confinement ring and edge-control structures. Hana Materials' publicly available product information indicates that silicon electrodes and rings for semiconductor dry etching are consumable components used for gas dispersion and wafer fixation, with specifications including outer diameters of 240?550 mm, gas-hole diameters of 0.2?0.8 mm, flatness and machining precision below 10 ?m, and strict defect-free requirements for chipping, scratching and cracking. As GAA logic, 3D NAND, HBM-related DRAM, TSV and advanced packaging processes increase etch depth, profile-control requirements and plasma uniformity requirements, silicon parts will continue to evolve toward higher purity, larger size, more complex geometry, lower particle generation, longer lifetime, stronger traceability and chamber-specific customization.

The policy and supply-chain environment is increasing the strategic relevance of Silicon Parts for Etching, even though silicon electrodes and silicon rings are usually not listed as standalone policy items. These products sit at the intersection of semiconductor materials, semiconductor equipment parts and wafer-fabrication consumables, and are therefore affected by policies covering IC equipment, critical materials, spare parts, tax incentives, import tariffs, export controls and regional supply-chain security. In China, qualifying IC design, manufacturing, equipment, materials, packaging and testing enterprises may benefit from a 15% super input VAT credit from 2023 to 2027, which can improve cash flow for qualified semiconductor materials and equipment-related companies investing in R&D, inspection equipment, clean manufacturing and customer qualification. In the United States, CHIPS for America provides roughly US\$50 billion to strengthen semiconductor research, development and manufacturing, while USTR Section 301 actions have raised tariffs on certain China-origin wafers and polysilicon to 50% and emphasize alternative sourcing, reduced reliance on China and secure supply chains. In Europe, the EU Chips Act aims to increase Europe's global share of cutting-edge semiconductors to 20%, reinforcing local manufacturing and supply-chain resilience. For silicon parts suppliers, these policies collectively push the industry away from pure low-cost global sourcing and toward localized production, origin compliance, dual sourcing, OEM-approved supply chains and regional service capability.

The competitive landscape remains highly concentrated and strongly linked to etch equipment OEM platforms, wafer-fab qualification systems and long-term spare-parts service capability. Based on the report dataset, Silfex Inc. remains the clear global leader, with revenue share declining from 57.46% in 2021 to 50.05% in 2025 but still accounting for roughly half of the market. Hana Materials, Worldex, CMTX, CoorsTek, KC Parts Tech, TKG Solmics, Mitsubishi Materials, RS Technologies and Ferrotec-related players form the next competitive layer, while Chinese suppliers such as DSTC, Thinkon, Genori, Beijing Yisheng, Wuxi Ruijixinsheng and other emerging vendors are gradually increasing their visibility. By production region, North America remains the largest supply base, with a 2025 output share of 46.64%, though this is expected to fall to 42.40% by 2032 as Asia expands. Korea accounts for 23.83% in 2025, Japan 16.89%, and China rises from 6.82% in 2021 to 10.18% in 2025 and an estimated 18.43% by 2032, making China the fastest-growing production region. On the demand side, North America, Japan, Korea and Taiwan remain the core consumption regions, but China's consumption share is expected to rise from 11.54% in 2025 to 15.76% by 2032. Silfex publicly states that it serves major segments of the semiconductor processing equipment market, including etch, PVD, test, ion implant and thermal processing, and emphasizes confidentiality, IP protection, engineering capability and high-quality component delivery, highlighting that competition in this industry is based

not only on capacity but also on OEM trust, qualification history, IP boundary management, batch consistency and delivery reliability.

The global Silicon Parts for Etching market has moved from post-downturn recovery into a new growth phase driven by AI, advanced logic, advanced memory, 300 mm fab investment and regional semiconductor supply-chain restructuring. The principal demand drivers include AI/HPC chips, data-center infrastructure, HBM and DRAM upgrades, 3D NAND layer scaling, GAA and sub-2 nm logic, TSV and advanced packaging, as well as stable demand from automotive, industrial, power semiconductor, analog and specialty-process fabs. SEMI expects worldwide 300 mm fab equipment spending to grow 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 industrial ecosystems. Because silicon electrodes and silicon rings are consumable etch-chamber parts rather than one-time capital equipment, their long-term demand should be modeled as a function of etch tool installed base, fab utilization, etch-step intensity, consumable replacement cycles and high-end product ASP uplift, rather than wafer starts alone.

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

This Insight Report provides a comprehensive analysis of the global Silicon Parts 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 Parts 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 Parts for Etching market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Silicon Parts 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 Parts for Etching.

This report presents a comprehensive overview, market shares, and growth opportunities of Silicon Parts 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 Parts for Etching market?

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

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

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

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

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