

# Global Temperature Control Chiller for Semiconductor Market Growth 2026-2032

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## Abstracts

The global Temperature Control Chiller for Semiconductor market size is predicted to grow from US\$ 830 million in 2025 to US\$ 1361 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

Temperature control chiller for semiconductor is mainly used to precisely control the temperature of the reaction chamber in the semiconductor manufacturing process. It is a self-balancing circulation device mainly composed of a heat exchanger, a circulation pump, a compressor and a control system. It belongs to the temperature control equipment in the production process.

Semiconductor special temperature control equipment uses the heat exchange principle of refrigeration cycle and process cooling water to control the temperature, flow and pressure of the circulating fluid used in semiconductor process equipment with high precision to achieve the temperature control requirements of semiconductor process. It is an integrated circuit manufacturing Indispensable key equipment in the process.

According to the requirements of different processes, the circulating liquid at a given temperature is controlled to flow through the electrodes or the walls in the reaction chamber of the semiconductor process equipment, and heat is brought into the semiconductor-specific temperature control equipment, which transfers the heat to the refrigeration through the heat exchanger. refrigerant, and then release the heat to the process cooling water through the refrigerant, so as to realize the temperature control of the process.

China is currently the world's largest market of Semiconductor Temperature Control Equipment (Semiconductor Chiller), accounted for 30.63% of the global share in 2025,

followed by North America (22.79%), China Taiwan province (17.85%), and South Korea (14.1%).

North American market for Semiconductor Temperature Control Equipment was valued at \$ 193.4 million in 2025 and will reach \$ 285.85 million by 2032, at a CAGR of 5.78% during the forecast period of 2026 through 2032.

China market for Semiconductor Temperature Control Equipment was valued at \$ 259.9 million in 2025 and will reach \$ 480.96 million by 2032, at a CAGR of 9.13% during the forecast period of 2026 through 2032.

Europe market for Semiconductor Temperature Control Equipment was valued at \$ 44.46 million in 2025 and will reach \$ 63.83 million by 2032, at a CAGR of 5.67% during the forecast period of 2026 through 2032.

South Korea market for Semiconductor Temperature Control Equipment was valued at \$ 119.64 million in 2025 and will reach \$ 188.49 million by 2032, at a CAGR of 6.61% during the forecast period of 2026 through 2032.

The global key manufacturers of Semiconductor Temperature Control Equipment include Advanced Thermal Sciences (ATS), Shinwa Controls, Beijing Jingyi Automation, Unisem, Thermo Fisher Scientific, FST (Fine Semitech Corp), SMC Corporation, Techist, Ferrotec, and GST (Global Standard Technology), etc. In 2025, the global ten largest players hold a share approximately 78.25% in terms of revenue.

From the production side of Semiconductor Temperature Control Equipment, North America, South Korea, Japan, and China dominate Semiconductor Temperature Control Equipment production. In 2025, these regions held market shares of 29.36%, 24.32%, 19.62%, and 23.31%, respectively. China is expected to maintain the fastest growth, with its share projected to reach 31.3% by 2032.

In terms of product type, dual channel chillers hold the largest market share, expected to reach 61.53% by 2031. While in terms of applications, etching accounted for approximately 60.74% in 2024, with a projected CAGR of 5.65% in the coming years.

In terms of cooling technologies, water-cooled chillers dominate the market (over 80.8% share in 2025), while air-cooled and hybrid types hold smaller shares. water-cooled chillers are expected to remain predominant in the foreseeable future.

In terms of technical pathways, currently compressor-type chillers and heat exchangers are in the dominant position, however, thermoelectric (TEC) chillers are projected to exhibit the fastest growth in the coming years.

The global Semiconductor Temperature Control Equipment market is expanding alongside the semiconductor upcycle and the sustained build-out of fab capacity and installed-base process tools. In 2024, worldwide semiconductor sales reached US\$627.6B, and the sales outlook remains strongly positive into 2025–2026, supporting high utilization and continued equipment demand. Semiconductor Industry Association At the same time, SEMI forecasts total semiconductor manufacturing equipment sales of US\$125.5B (2025) and US\$138.1B (2026), and its World Fab Forecast expects 18 new fabs to start construction in 2025—both of which translate directly into incremental chillers for new tool shipments and for supporting sub-systems. Demand is also “premiumizing” because chillers are increasingly yield-enabling rather than utility-like: toolmakers commonly require temperature stability around  $\pm 0.1$  K for many process loops (e.g., etch) and down to  $\pm 0.001$  K for the most temperature-sensitive applications (e.g., lithography), with operating ranges that can span  $-80^{\circ}\text{C}$  to  $+150^{\circ}\text{C}$  depending on the loop and use case. This drives higher value per system (better controls, tighter hydraulics, higher-quality sensors/valves/filtration, and application-specific thermal loop engineering) and a growing recurring aftermarket (preventive maintenance, spares, field service) as fabs push uptime and variability targets.

Key market trends and drivers are converging around performance, energy, compliance, and reliability. First, tighter process windows and higher local heat flux push TCUs toward faster transient response, multi-circuit/multi-zone architectures, and more liquid-to-liquid and “right-temperature” designs that match each sub-loop’s needs to reduce total energy consumption without sacrificing stability. Second, fabs increasingly require connected chillers (telemetry, remote diagnostics, predictive maintenance) and modular/redundant designs to protect tool availability as the installed base scales. Third, environmental regulation is becoming a specification-level constraint: the European Union F-gas Regulation (EU) 2024/573 is accelerating adoption of lower-GWP refrigerants, forcing platform redesigns, re-qualification, and updated service procedures across suppliers and fab operators. Fourth, EHS and material stewardship are rising in importance for semiconductor thermal ecosystems—e.g., industry discussions around heat-transfer fluids emphasize tight control requirements (often  $\sim \pm 0.1^{\circ}\text{C}$ ) and compatibility constraints, which can influence fluid selection and qualification practices alongside chiller design. Overall, the core growth engine is the combination of fab expansion + higher thermal-performance requirements + lifecycle support intensity, with regulation and sustainability accelerating

technology refresh and creating additional retrofit/replacement demand.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Temperature Control Chiller for Semiconductor and breaks down the forecast by 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 Temperature Control Chiller for Semiconductor.

This report presents a comprehensive overview, market shares, and growth opportunities of Temperature Control Chiller for Semiconductor market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single Channel Chiller

Dual Channel Chiller

Three Channel Chiller

Segmentation by Technology:

Compressor Type Chiller

Heat Exchanger Type Chiller

Thermoelectric (TEC) Chiller

Cryogenic Chiller

Segmentation by Application:

Etching Process

Coater/Developer

Ion Implantation

Diffusion Process

Deposition Process

CMP Process

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

Advanced Thermal Sciences (ATS)

Shinwa Controls

Unisem

GST (Global Standard Technology)

SMC Corporation

Beijing Jingyi Automation Equipment Technology

FST (Fine Semitech Corp)

Techist

Thermo Fisher Scientific

Mirapro Co., Ltd

Solid State Cooling Systems

LNEYA Thermo Refrigeration

BV Thermal Systems

Legacy Chiller

LAUDA-Noah

CJ Tech Inc

Step Science

Thermonics (InTest Thermal Solutions (ITS))

Maruyama Chillers

Mydax, Inc.

Sanhe Tongfei Refrigeration

Ferrotec

Ebara

AIRSYS Cooling Technologies Inc.

GMC Semitech

PTC, Inc.

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global Temperature Control Chiller for Semiconductor market?

What factors are driving Temperature Control Chiller for Semiconductor market growth, globally and by region?

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

How do Temperature Control Chiller for Semiconductor market opportunities vary by end market size?

How does Temperature Control Chiller for Semiconductor break out by Type, by Application?

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