

Global Yttria Coating Materials Market Growth 2026-2032

<https://marketpublishers.com/r/G9939823DDE5EN.html>

Date: October 2026

Pages: 100

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

ID: G9939823DDE5EN

Abstracts

The global Yttria Coating Materials market size is predicted to grow from US\$ 222 million in 2025 to US\$ 307 million in 2032; it is expected to grow at a CAGR of 4.8% from 2026 to 2032.

Yttria coating materials are functional materials based on high-purity yttrium oxide and engineered to form plasma-erosion-resistant, corrosion-resistant, high-temperature-resistant, and electrically insulating protective layers on metal, ceramic, quartz, and other substrates. They are primarily sold as spray powders, suspensions, slurries, and targets, with product specifications typically differentiated by purity, particle size, and compatible deposition process. Major demand comes from chamber components used in semiconductor etching and deposition equipment, with additional applications in display manufacturing, aerospace, energy, and other severe operating environments. This study focuses on yttria materials sold as feedstocks for coating formation, with an estimated blended gross margin of approximately 34%.

Market Trends

Yttria coating materials are moving from general-purpose spray powders toward ultra-high-purity products with narrow particle-size distributions, high sphericity, and tighter control of trace impurities. Stricter requirements for particle release, porosity, surface roughness, and resistance to halogen plasma in semiconductor etch chambers are expanding the use of dense spherical powders, suspension-plasma-spray feedstocks, and fine powders for aerosol deposition. Procurement is consequently shifting from a single purity specification toward combined validation of morphology, flowability, deposition efficiency, coating density, and lot-to-lot consistency.

Drivers

More advanced logic, memory, and high-aspect-ratio etch steps expose chamber walls, showerheads, focus rings, electrostatic chucks, and related components to increasingly severe fluorine- and chlorine-based plasmas. Longer maintenance intervals, tighter particle control, and higher yield requirements support recurring consumption of high-purity yttria materials in both new equipment and refurbished spare parts.

Restraints

Supply of high-purity yttria feedstock remains concentrated and can be affected by rare-earth separation capacity, export administration, and inventory cycles. Spray-grade materials also require granulation, spheroidization, classification, and trace-impurity control, while lengthy customer qualification and strict consistency requirements slow the ramp-up of new suppliers.

Opportunities

Suspension plasma spraying, aerosol deposition, and low-porosity dense coatings create incremental demand for finer feedstocks. Capacity additions in wafer manufacturing and local equipment supply chains across mainland China, South Korea, Southeast Asia, and the United States favor suppliers that combine electronic-grade purification, customized particle sizing, and local technical support.

Challenges

Yttria can face zone-specific substitution from alumina, yttrium oxyfluoride, and composite rare-earth ceramics, as customers do not select materials on erosion resistance alone. Suppliers must balance coating performance, particle control, cost, delivery security, and long-term process stability; significant lot variation can trigger requalification or order transfers.

Industry Chain Analysis

Upstream activities cover yttrium-bearing rare-earth resources, separated yttria, and high-purity processing chemicals, with cost and supply stability linked to separation, refining, and impurity-control capabilities. Midstream producers convert general yttria into coating feedstocks through purification, calcination, milling and classification, spray granulation, sintering or spheroidization, dispersion, and target sintering. Most value is

created through ultra-high-purity control, particle and morphology design, dispersion stability, lot traceability, and joint customer qualification rather than through the base oxide alone.

Downstream participants include coating service providers, semiconductor and display equipment component supply chains, and equipment users. Materials must be matched with torch parameters, substrate pretreatment, post-processing, cleaning, and refurbishment procedures, so application development and field support materially affect qualification speed and repeat purchasing.

Segment Insights

Thermal spray powder remains the largest segment because it fits established atmospheric plasma spray lines and protects large chamber surfaces. Ultra-high-purity materials with narrow 10–30 μ m distributions and dense spherical morphology command greater value in high-exposure zones. Suspensions and submicron feedstocks account for a smaller share but have stronger penetration potential where lower surface roughness, porosity, and particle shedding are required.

Downstream Market Opportunities

Semiconductor equipment provides the most visible demand, particularly in advanced etch and deposition tools and frequently refurbished components. Display equipment is comparatively mature, while aerospace and energy applications emphasize thermal stability, insulation, and corrosion resistance and therefore use specifications that differ from electronic-grade semiconductor materials.

Regional Insights

Asia-Pacific combines wafer fabrication, display production, equipment-component processing, and rare-earth refining and is the largest production and consumption region. Japan and Europe retain strong capabilities in premium powder processing and thermal-spray material systems, while local qualification is accelerating in mainland China and South Korea. North American demand is supported by advanced-node investment, aerospace applications, and supply-chain security, creating room for localized capacity.

Competitive Landscape Analysis

The market includes global thermal-spray material groups, Japanese high-purity rare-earth suppliers, and specialized Asian powder producers. Established participants differentiate through feedstock purification, granulation and spheroidization, particle-size control, and global application support, while regional suppliers compete on cost, lead time, and customization. Competition is shifting from unit price toward long-term lot consistency, coating validation data, supply security, and the ability to co-develop materials with equipment processes.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Yttria Coating Materials 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 Yttria Coating Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of Yttria Coating Materials market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Dry Powder

Water-Based Suspension

Solvent-Based Suspension

Sputtering Targets

Other Forms

Segmentation by Purity:

Below 99.9%

99.9% to Below 99.99%

99.99% to Below 99.999%

99.999% and Above

Segmentation by Particle Size:

Below 1 μ m

1 μ m to Below 10 μ m

10–30 μ m

Above 30 μ m

Segmentation by Application:

Semiconductor Equipment

Display Equipment

Aerospace and Defense

Energy

Automotive

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.

Oerlikon Metco

Saint-Gobain

Praxair Surface Technologies

Tosoh

Shin-Etsu Chemical

Treibacher Industrie

H?gan?s

Resonac

Jinzhou Jinjiang Spray Materials

Key Questions Addressed in this Report

What is the 10-year outlook for the global Yttria Coating Materials market?

What factors are driving Yttria Coating Materials market growth, globally and by region?

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

How do Yttria Coating Materials market opportunities vary by end market size?

How does Yttria Coating Materials break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Yttria Coating Materials Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Yttria Coating Materials by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Yttria Coating Materials by Country/Region, 2021, 2025 & 2032
- 2.2 Yttria Coating Materials Segment by Type
 - 2.2.1 Dry Powder
 - 2.2.2 Water-Based Suspension
 - 2.2.3 Solvent-Based Suspension
 - 2.2.4 Sputtering Targets
 - 2.2.5 Other Forms
 - 2.2.6 Yttria Coating Materials Sales by Type
 - 2.2.6.1 Global Yttria Coating Materials Sales Market Share by Type (2021-2026)
 - 2.2.6.2 Global Yttria Coating Materials Revenue and Market Share by Type (2021-2026)
 - 2.2.6.3 Global Yttria Coating Materials Sale Price by Type (2021-2026)
- 2.3 Yttria Coating Materials Segment by Purity
 - 2.3.1 Below 99.9%
 - 2.3.2 99.9% to Below 99.99%
 - 2.3.3 99.99% to Below 99.999%
 - 2.3.4 99.999% and Above
 - 2.3.5 Yttria Coating Materials Sales by Purity
 - 2.3.5.1 Global Yttria Coating Materials Sales Market Share by Purity (2021-2026)

2.3.5.2 Global Yttria Coating Materials Revenue and Market Share by Purity (2021-2026)

2.3.5.3 Global Yttria Coating Materials Sale Price by Purity (2021-2026)

2.4 Yttria Coating Materials Segment by Particle Size

2.4.1 Below 1 μ m

2.4.2 1 μ m to Below 10 μ m

2.4.3 10–30 μ m

2.4.4 Above 30 μ m

2.4.5 Yttria Coating Materials Sales by Particle Size

2.4.5.1 Global Yttria Coating Materials Sales Market Share by Particle Size (2021-2026)

2.4.5.2 Global Yttria Coating Materials Revenue and Market Share by Particle Size (2021-2026)

2.4.5.3 Global Yttria Coating Materials Sale Price by Particle Size (2021-2026)

2.5 Yttria Coating Materials Segment by Application

2.5.1 Semiconductor Equipment

2.5.2 Display Equipment

2.5.3 Aerospace and Defense

2.5.4 Energy

2.5.5 Automotive

2.5.6 Others

2.5.7 Yttria Coating Materials Sales by Application

2.5.7.1 Global Yttria Coating Materials Sale Market Share by Application (2021-2026)

2.5.7.2 Global Yttria Coating Materials Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Yttria Coating Materials Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Yttria Coating Materials Breakdown Data by Company

3.1.1 Global Yttria Coating Materials Annual Sales by Company (2021-2026)

3.1.2 Global Yttria Coating Materials Sales Market Share by Company (2021-2026)

3.2 Global Yttria Coating Materials Annual Revenue by Company (2021-2026)

3.2.1 Global Yttria Coating Materials Revenue by Company (2021-2026)

3.2.2 Global Yttria Coating Materials Revenue Market Share by Company (2021-2026)

3.3 Global Yttria Coating Materials Sale Price by Company

3.4 Key Manufacturers Yttria Coating Materials Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Yttria Coating Materials Product Location Distribution

- 3.4.2 Players Yttria Coating Materials Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR YTTRIA COATING MATERIALS BY GEOGRAPHIC REGION

- 4.1 World Historic Yttria Coating Materials Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Yttria Coating Materials Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Yttria Coating Materials Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Yttria Coating Materials Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Yttria Coating Materials Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Yttria Coating Materials Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Yttria Coating Materials Sales Growth
- 4.4 APAC Yttria Coating Materials Sales Growth
- 4.5 Europe Yttria Coating Materials Sales Growth
- 4.6 Middle East & Africa Yttria Coating Materials Sales Growth

5 AMERICAS

- 5.1 Americas Yttria Coating Materials Sales by Country
 - 5.1.1 Americas Yttria Coating Materials Sales by Country (2021-2026)
 - 5.1.2 Americas Yttria Coating Materials Revenue by Country (2021-2026)
- 5.2 Americas Yttria Coating Materials Sales by Type (2021-2026)
- 5.3 Americas Yttria Coating Materials Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Yttria Coating Materials Sales by Region
 - 6.1.1 APAC Yttria Coating Materials Sales by Region (2021-2026)

- 6.1.2 APAC Yttria Coating Materials Revenue by Region (2021-2026)
- 6.2 APAC Yttria Coating Materials Sales by Type (2021-2026)
- 6.3 APAC Yttria Coating Materials Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Yttria Coating Materials by Country
 - 7.1.1 Europe Yttria Coating Materials Sales by Country (2021-2026)
 - 7.1.2 Europe Yttria Coating Materials Revenue by Country (2021-2026)
- 7.2 Europe Yttria Coating Materials Sales by Type (2021-2026)
- 7.3 Europe Yttria Coating Materials Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Yttria Coating Materials by Country
 - 8.1.1 Middle East & Africa Yttria Coating Materials Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Yttria Coating Materials Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Yttria Coating Materials Sales by Type (2021-2026)
- 8.3 Middle East & Africa Yttria Coating Materials Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Yttria Coating Materials

10.3 Manufacturing Process Analysis of Yttria Coating Materials

10.4 Industry Chain Structure of Yttria Coating Materials

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Yttria Coating Materials Distributors

11.3 Yttria Coating Materials Customer

12 WORLD FORECAST REVIEW FOR YTTRIA COATING MATERIALS BY GEOGRAPHIC REGION

12.1 Global Yttria Coating Materials Market Size Forecast by Region

12.1.1 Global Yttria Coating Materials Forecast by Region (2027-2032)

12.1.2 Global Yttria Coating Materials Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Yttria Coating Materials Forecast by Type (2027-2032)

12.7 Global Yttria Coating Materials Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Oerlikon Metco

13.1.1 Oerlikon Metco Company Information

13.1.2 Oerlikon Metco Yttria Coating Materials Product Portfolios and Specifications

13.1.3 Oerlikon Metco Yttria Coating Materials Sales, Revenue, Price and Gross

Margin (2021-2026)

13.1.4 Oerlikon Metco Main Business Overview

13.1.5 Oerlikon Metco Latest Developments

13.2 Saint-Gobain

13.2.1 Saint-Gobain Company Information

13.2.2 Saint-Gobain Yttria Coating Materials Product Portfolios and Specifications

13.2.3 Saint-Gobain Yttria Coating Materials Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Saint-Gobain Main Business Overview

13.2.5 Saint-Gobain Latest Developments

13.3 Praxair Surface Technologies

13.3.1 Praxair Surface Technologies Company Information

13.3.2 Praxair Surface Technologies Yttria Coating Materials Product Portfolios and Specifications

13.3.3 Praxair Surface Technologies Yttria Coating Materials Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Praxair Surface Technologies Main Business Overview

13.3.5 Praxair Surface Technologies Latest Developments

13.4 Tosoh

13.4.1 Tosoh Company Information

13.4.2 Tosoh Yttria Coating Materials Product Portfolios and Specifications

13.4.3 Tosoh Yttria Coating Materials Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Tosoh Main Business Overview

13.4.5 Tosoh Latest Developments

13.5 Shin-Etsu Chemical

13.5.1 Shin-Etsu Chemical Company Information

13.5.2 Shin-Etsu Chemical Yttria Coating Materials Product Portfolios and Specifications

13.5.3 Shin-Etsu Chemical Yttria Coating Materials Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Shin-Etsu Chemical Main Business Overview

13.5.5 Shin-Etsu Chemical Latest Developments

13.6 Treibacher Industrie

13.6.1 Treibacher Industrie Company Information

13.6.2 Treibacher Industrie Yttria Coating Materials Product Portfolios and Specifications

13.6.3 Treibacher Industrie Yttria Coating Materials Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Treibacher Industrie Main Business Overview

13.6.5 Treibacher Industrie Latest Developments

13.7 H?gan?s

13.7.1 H?gan?s Company Information

13.7.2 H?gan?s Yttria Coating Materials Product Portfolios and Specifications

13.7.3 H?gan?s Yttria Coating Materials Sales, Revenue, Price and Gross Margin
(2021-2026)

13.7.4 H?gan?s Main Business Overview

13.7.5 H?gan?s Latest Developments

13.8 Resonac

13.8.1 Resonac Company Information

13.8.2 Resonac Yttria Coating Materials Product Portfolios and Specifications

13.8.3 Resonac Yttria Coating Materials Sales, Revenue, Price and Gross Margin
(2021-2026)

13.8.4 Resonac Main Business Overview

13.8.5 Resonac Latest Developments

13.9 Jinzhou Jinjiang Spray Materials

13.9.1 Jinzhou Jinjiang Spray Materials Company Information

13.9.2 Jinzhou Jinjiang Spray Materials Yttria Coating Materials Product Portfolios and
Specifications

13.9.3 Jinzhou Jinjiang Spray Materials Yttria Coating Materials Sales, Revenue, Price
and Gross Margin (2021-2026)

13.9.4 Jinzhou Jinjiang Spray Materials Main Business Overview

13.9.5 Jinzhou Jinjiang Spray Materials Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Yttria Coating Materials Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Yttria Coating Materials Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Dry Powder

Table 4. Major Players of Water-Based Suspension

Table 5. Major Players of Solvent-Based Suspension

Table 6. Major Players of Sputtering Targets

Table 7. Major Players of Other Forms

Table 8. Global Yttria Coating Materials Sales by Type (2021-2026) & (kg)

Table 9. Global Yttria Coating Materials Sales Market Share by Type (2021-2026)

Table 10. Global Yttria Coating Materials Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Yttria Coating Materials Revenue Market Share by Type (2021-2026)

Table 12. Global Yttria Coating Materials Sale Price by Type (2021-2026) & (US\$/kg)

Table 13. Major Players of Below 99.9%

Table 14. Major Players of 99.9% to Below 99.99%

Table 15. Major Players of 99.99% to Below 99.999%

Table 16. Major Players of 99.999% and Above

Table 17. Global Yttria Coating Materials Sales by Purity (2021-2026) & (kg)

Table 18. Global Yttria Coating Materials Sales Market Share by Purity (2021-2026)

Table 19. Global Yttria Coating Materials Revenue by Purity (2021-2026) & (\$ million)

Table 20. Global Yttria Coating Materials Revenue Market Share by Purity (2021-2026)

Table 21. Global Yttria Coating Materials Sale Price by Purity (2021-2026) & (US\$/kg)

Table 22. Major Players of Below 1 ?m

Table 23. Major Players of 1 ?m to Below 10 ?m

Table 24. Major Players of 10–30 ?m

Table 25. Major Players of Above 30 ?m

Table 26. Global Yttria Coating Materials Sales by Particle Size (2021-2026) & (kg)

Table 27. Global Yttria Coating Materials Sales Market Share by Particle Size (2021-2026)

Table 28. Global Yttria Coating Materials Revenue by Particle Size (2021-2026) & (\$ million)

Table 29. Global Yttria Coating Materials Revenue Market Share by Particle Size (2021-2026)

Table 30. Global Yttria Coating Materials Sale Price by Particle Size (2021-2026) &

(US\$/kg)

Table 31. Global Yttria Coating Materials Sale by Application (2021-2026) & (kg)

Table 32. Global Yttria Coating Materials Sale Market Share by Application (2021-2026)

Table 33. Global Yttria Coating Materials Revenue by Application (2021-2026) & (\$ million)

Table 34. Global Yttria Coating Materials Revenue Market Share by Application (2021-2026)

Table 35. Global Yttria Coating Materials Sale Price by Application (2021-2026) & (US\$/kg)

Table 36. Global Yttria Coating Materials Sales by Company (2021-2026) & (kg)

Table 37. Global Yttria Coating Materials Sales Market Share by Company (2021-2026)

Table 38. Global Yttria Coating Materials Revenue by Company (2021-2026) & (\$ millions)

Table 39. Global Yttria Coating Materials Revenue Market Share by Company (2021-2026)

Table 40. Global Yttria Coating Materials Sale Price by Company (2021-2026) & (US\$/kg)

Table 41. Key Manufacturers Yttria Coating Materials Producing Area Distribution and Sales Area

Table 42. Players Yttria Coating Materials Products Offered

Table 43. Yttria Coating Materials Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 44. New Products and Potential Entrants

Table 45. Market M&A Activity & Strategy

Table 46. Global Yttria Coating Materials Sales by Geographic Region (2021-2026) & (kg)

Table 47. Global Yttria Coating Materials Sales Market Share Geographic Region (2021-2026)

Table 48. Global Yttria Coating Materials Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 49. Global Yttria Coating Materials Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Yttria Coating Materials Sales by Country/Region (2021-2026) & (kg)

Table 51. Global Yttria Coating Materials Sales Market Share by Country/Region (2021-2026)

Table 52. Global Yttria Coating Materials Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Yttria Coating Materials Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Yttria Coating Materials Sales by Country (2021-2026) & (kg)

Table 55. Americas Yttria Coating Materials Sales Market Share by Country (2021-2026)

Table 56. Americas Yttria Coating Materials Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Yttria Coating Materials Sales by Type (2021-2026) & (kg)

Table 58. Americas Yttria Coating Materials Sales by Application (2021-2026) & (kg)

Table 59. APAC Yttria Coating Materials Sales by Region (2021-2026) & (kg)

Table 60. APAC Yttria Coating Materials Sales Market Share by Region (2021-2026)

Table 61. APAC Yttria Coating Materials Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Yttria Coating Materials Sales by Type (2021-2026) & (kg)

Table 63. APAC Yttria Coating Materials Sales by Application (2021-2026) & (kg)

Table 64. Europe Yttria Coating Materials Sales by Country (2021-2026) & (kg)

Table 65. Europe Yttria Coating Materials Revenue by Country (2021-2026) & (\$ millions)

Table 66. Europe Yttria Coating Materials Sales by Type (2021-2026) & (kg)

Table 67. Europe Yttria Coating Materials Sales by Application (2021-2026) & (kg)

Table 68. Middle East & Africa Yttria Coating Materials Sales by Country (2021-2026) & (kg)

Table 69. Middle East & Africa Yttria Coating Materials Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Yttria Coating Materials Sales by Type (2021-2026) & (kg)

Table 71. Middle East & Africa Yttria Coating Materials Sales by Application (2021-2026) & (kg)

Table 72. Key Market Drivers & Growth Opportunities of Yttria Coating Materials

Table 73. Key Market Challenges & Risks of Yttria Coating Materials

Table 74. Key Industry Trends of Yttria Coating Materials

Table 75. Yttria Coating Materials Raw Material

Table 76. Key Suppliers of Raw Materials

Table 77. Yttria Coating Materials Distributors List

Table 78. Yttria Coating Materials Customer List

Table 79. Global Yttria Coating Materials Sales Forecast by Region (2027-2032) & (kg)

Table 80. Global Yttria Coating Materials Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Americas Yttria Coating Materials Sales Forecast by Country (2027-2032) & (kg)

Table 82. Americas Yttria Coating Materials Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. APAC Yttria Coating Materials Sales Forecast by Region (2027-2032) & (kg)

Table 84. APAC Yttria Coating Materials Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Europe Yttria Coating Materials Sales Forecast by Country (2027-2032) & (kg)

Table 86. Europe Yttria Coating Materials Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Middle East & Africa Yttria Coating Materials Sales Forecast by Country (2027-2032) & (kg)

Table 88. Middle East & Africa Yttria Coating Materials Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Global Yttria Coating Materials Sales Forecast by Type (2027-2032) & (kg)

Table 90. Global Yttria Coating Materials Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 91. Global Yttria Coating Materials Sales Forecast by Application (2027-2032) & (kg)

Table 92. Global Yttria Coating Materials Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 93. Oerlikon Metco Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 94. Oerlikon Metco Yttria Coating Materials Product Portfolios and Specifications

Table 95. Oerlikon Metco Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 96. Oerlikon Metco Main Business

Table 97. Oerlikon Metco Latest Developments

Table 98. Saint-Gobain Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 99. Saint-Gobain Yttria Coating Materials Product Portfolios and Specifications

Table 100. Saint-Gobain Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 101. Saint-Gobain Main Business

Table 102. Saint-Gobain Latest Developments

Table 103. Praxair Surface Technologies Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 104. Praxair Surface Technologies Yttria Coating Materials Product Portfolios and Specifications

Table 105. Praxair Surface Technologies Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 106. Praxair Surface Technologies Main Business

Table 107. Praxair Surface Technologies Latest Developments

Table 108. Tosoh Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 109. Tosoh Yttria Coating Materials Product Portfolios and Specifications

Table 110. Tosoh Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 111. Tosoh Main Business

Table 112. Tosoh Latest Developments

Table 113. Shin-Etsu Chemical Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 114. Shin-Etsu Chemical Yttria Coating Materials Product Portfolios and Specifications

Table 115. Shin-Etsu Chemical Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 116. Shin-Etsu Chemical Main Business

Table 117. Shin-Etsu Chemical Latest Developments

Table 118. Treibacher Industrie Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 119. Treibacher Industrie Yttria Coating Materials Product Portfolios and Specifications

Table 120. Treibacher Industrie Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 121. Treibacher Industrie Main Business

Table 122. Treibacher Industrie Latest Developments

Table 123. H?gan?s Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 124. H?gan?s Yttria Coating Materials Product Portfolios and Specifications

Table 125. H?gan?s Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 126. H?gan?s Main Business

Table 127. H?gan?s Latest Developments

Table 128. Resonac Basic Information, Yttria Coating Materials Manufacturing Base, Sales Area and Its Competitors

Table 129. Resonac Yttria Coating Materials Product Portfolios and Specifications

Table 130. Resonac Yttria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 131. Resonac Main Business

Table 132. Resonac Latest Developments

Table 133. Jinzhou Jinjiang Spray Materials Basic Information, Yttria Coating Materials

Manufacturing Base, Sales Area and Its Competitors

Table 134. Jinzhou Jinjiang Spray Materials Ytria Coating Materials Product Portfolios and Specifications

Table 135. Jinzhou Jinjiang Spray Materials Ytria Coating Materials Sales (kg), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 136. Jinzhou Jinjiang Spray Materials Main Business

Table 137. Jinzhou Jinjiang Spray Materials Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Yttria Coating Materials
- Figure 2. Yttria Coating Materials Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Yttria Coating Materials Sales Growth Rate 2021-2032 (kg)
- Figure 7. Global Yttria Coating Materials Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Yttria Coating Materials Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Yttria Coating Materials Sales Market Share by Country/Region (2025)
- Figure 10. Yttria Coating Materials Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Dry Powder
- Figure 12. Product Picture of Water-Based Suspension
- Figure 13. Product Picture of Solvent-Based Suspension
- Figure 14. Product Picture of Sputtering Targets
- Figure 15. Product Picture of Other Forms
- Figure 16. Global Yttria Coating Materials Sales Market Share by Type in 2026
- Figure 17. Global Yttria Coating Materials Revenue Market Share by Type (2021-2026)
- Figure 18. Product Picture of Below 99.9%
- Figure 19. Product Picture of 99.9% to Below 99.99%
- Figure 20. Product Picture of 99.99% to Below 99.999%
- Figure 21. Product Picture of 99.999% and Above
- Figure 22. Global Yttria Coating Materials Sales Market Share by Purity in 2026
- Figure 23. Global Yttria Coating Materials Revenue Market Share by Purity (2021-2026)
- Figure 24. Product Picture of Below 1 ?m
- Figure 25. Product Picture of 1 ?m to Below 10 ?m
- Figure 26. Product Picture of 10–30 ?m
- Figure 27. Product Picture of Above 30 ?m
- Figure 28. Global Yttria Coating Materials Sales Market Share by Particle Size in 2026
- Figure 29. Global Yttria Coating Materials Revenue Market Share by Particle Size (2021-2026)
- Figure 30. Yttria Coating Materials Consumed in Semiconductor Equipment
- Figure 31. Global Yttria Coating Materials Market: Semiconductor Equipment (2021-2026) & (kg)

- Figure 32. Yttria Coating Materials Consumed in Display Equipment
- Figure 33. Global Yttria Coating Materials Market: Display Equipment (2021-2026) & (kg)
- Figure 34. Yttria Coating Materials Consumed in Aerospace and Defense
- Figure 35. Global Yttria Coating Materials Market: Aerospace and Defense (2021-2026) & (kg)
- Figure 36. Yttria Coating Materials Consumed in Energy
- Figure 37. Global Yttria Coating Materials Market: Energy (2021-2026) & (kg)
- Figure 38. Yttria Coating Materials Consumed in Automotive
- Figure 39. Global Yttria Coating Materials Market: Automotive (2021-2026) & (kg)
- Figure 40. Yttria Coating Materials Consumed in Others
- Figure 41. Global Yttria Coating Materials Market: Others (2021-2026) & (kg)
- Figure 42. Global Yttria Coating Materials Sale Market Share by Application (2025)
- Figure 43. Global Yttria Coating Materials Revenue Market Share by Application in 2025
- Figure 44. Yttria Coating Materials Sales by Company in 2025 (kg)
- Figure 45. Global Yttria Coating Materials Sales Market Share by Company in 2025
- Figure 46. Yttria Coating Materials Revenue by Company in 2025 (\$ millions)
- Figure 47. Global Yttria Coating Materials Revenue Market Share by Company in 2025
- Figure 48. Global Yttria Coating Materials Sales Market Share by Geographic Region (2021-2026)
- Figure 49. Global Yttria Coating Materials Revenue Market Share by Geographic Region in 2025
- Figure 50. Americas Yttria Coating Materials Sales 2021-2026 (kg)
- Figure 51. Americas Yttria Coating Materials Revenue 2021-2026 (\$ millions)
- Figure 52. APAC Yttria Coating Materials Sales 2021-2026 (kg)
- Figure 53. APAC Yttria Coating Materials Revenue 2021-2026 (\$ millions)
- Figure 54. Europe Yttria Coating Materials Sales 2021-2026 (kg)
- Figure 55. Europe Yttria Coating Materials Revenue 2021-2026 (\$ millions)
- Figure 56. Middle East & Africa Yttria Coating Materials Sales 2021-2026 (kg)
- Figure 57. Middle East & Africa Yttria Coating Materials Revenue 2021-2026 (\$ millions)
- Figure 58. Americas Yttria Coating Materials Sales Market Share by Country in 2025
- Figure 59. Americas Yttria Coating Materials Revenue Market Share by Country (2021-2026)
- Figure 60. Americas Yttria Coating Materials Sales Market Share by Type (2021-2026)
- Figure 61. Americas Yttria Coating Materials Sales Market Share by Application (2021-2026)
- Figure 62. United States Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)
- Figure 63. Canada Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 64. Mexico Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 65. Brazil Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 66. APAC Yttria Coating Materials Sales Market Share by Region in 2025

Figure 67. APAC Yttria Coating Materials Revenue Market Share by Region
(2021-2026)

Figure 68. APAC Yttria Coating Materials Sales Market Share by Type (2021-2026)

Figure 69. APAC Yttria Coating Materials Sales Market Share by Application
(2021-2026)

Figure 70. China Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 71. Japan Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 72. South Korea Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 73. Southeast Asia Yttria Coating Materials Revenue Growth 2021-2026 (\$
millions)

Figure 74. India Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 75. Australia Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 76. China Taiwan Yttria Coating Materials Revenue Growth 2021-2026 (\$
millions)

Figure 77. Europe Yttria Coating Materials Sales Market Share by Country in 2025

Figure 78. Europe Yttria Coating Materials Revenue Market Share by Country
(2021-2026)

Figure 79. Europe Yttria Coating Materials Sales Market Share by Type (2021-2026)

Figure 80. Europe Yttria Coating Materials Sales Market Share by Application
(2021-2026)

Figure 81. Germany Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 82. France Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 83. UK Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 84. Italy Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 85. Russia Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 86. Middle East & Africa Yttria Coating Materials Sales Market Share by Country
(2021-2026)

Figure 87. Middle East & Africa Yttria Coating Materials Sales Market Share by Type
(2021-2026)

Figure 88. Middle East & Africa Yttria Coating Materials Sales Market Share by
Application (2021-2026)

Figure 89. Egypt Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 90. South Africa Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 91. Israel Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 92. Turkey Yttria Coating Materials Revenue Growth 2021-2026 (\$ millions)

Figure 93. GCC Countries Yttria Coating Materials Revenue Growth 2021-2026 (\$

millions)

Figure 94. Manufacturing Cost Structure Analysis of Yttria Coating Materials in 2026

Figure 95. Manufacturing Process Analysis of Yttria Coating Materials

Figure 96. Industry Chain Structure of Yttria Coating Materials

Figure 97. Channels of Distribution

Figure 98. Global Yttria Coating Materials Sales Market Forecast by Region
(2027-2032)

Figure 99. Global Yttria Coating Materials Revenue Market Share Forecast by Region
(2027-2032)

Figure 100. Global Yttria Coating Materials Sales Market Share Forecast by Type
(2027-2032)

Figure 101. Global Yttria Coating Materials Revenue Market Share Forecast by Type
(2027-2032)

Figure 102. Global Yttria Coating Materials Sales Market Share Forecast by Application
(2027-2032)

Figure 103. Global Yttria Coating Materials Revenue Market Share Forecast by
Application (2027-2032)

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