

Global Deposition Equipment Market: Analysis By Type (PECVD, Sputtering PVD, Tubular CVD, Non-tubular LPCVD, ALD, MOCVD, Electroplating ECD, and Other); By Application (Semiconductor & Microelectronics, Solar Products, Data Storage, Medical Equipment, Cutting Tools, and Other); By Region Size, and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

In 2021, the global deposition equipment market was valued at US\$19.98 billion and is anticipated to grow to US\$43.14 billion by 2027. Deposition is the process of depositing a layer of material on a surface. Deposition of thin films involves several processes, including atom adsorption, atom diffusion on the wafer surface, and coalescence at strategic locations.

Deposition is an important manufacturing step in the fabrication of various opto-electronic, solid-state, and medical equipment and products, including consumer electronics, semiconductor lasers, fibre lasers, LED displays, optical filters, compound semiconductors, etc. Some of the major reasons why companies are using deposition equipment are the growth in consumer electronics industry, rise in automotive industry, escalating use of advanced medical equipment, increasing demand for environmentally friendly coating processes, rising silicon wafer demand, etc. The deposition equipment market is expected to grow at a CAGR of 13.85% over the forecast period of 2022-2027.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the deposition equipment market into eight segments based on type: PECVD, Sputtering PVD, Tubular CVD, Non-tubular LPCVD, ALD, MOCVD, Electroplating ECD, and Other. In 2021, PECVD segment lead the deposition equipment market and is expected to be the highest growing segment in the coming years. Given its great optical clarity and versatility, the smooth & tiny structure with high malleable qualities makes plasma-enhanced chemical vapor deposition equipment an ideal substance for optical filters, devices with unwanted refractive index, and anti-reflective coatings. The tough, resilient, and versatile qualities of these plasma coatings, together with advances that make them environmentally friendly, fuel the expansion of the PECVD equipment industry.

By Application: In the report, the global deposition equipment market is divided into six segments based on the application: Semiconductor & Microelectronics, Solar Products, Data Storage, Medical Equipment, Cutting Tools, and Other. The Semiconductor & Microelectronics segment held the highest share in the market in 2021 as they provide increased productivity and cost-efficiency. Solar Products segment is expected to be the fastest growing segment in the forecasted period. This is because of their effectiveness and potential for reducing production costs through large-scale production. The increase in global awareness regarding depletion of fossil fuels and its negative impact on the environment have created a demand for harnessing renewable energy resources such as solar energy.

By Region: The global deposition equipment market can be divided into four regions: Asia Pacific, North America, Europe, and Rest of the World. The Asia Pacific dominated the market in 2021 owing to the increase in growth in end-user applications such as capacitors, transistors, inductors, and resistors, coupled with rapid adoption of smartphones and laptops. China held the major share in the Asia Pacific deposition equipment market in 2021, owing to the strong economic growth in the region, the growing demand for microelectronics, automotive, photovoltaic cells coupled with emerging trend of electric/hybrid vehicles and green vehicles.

North America is anticipated to be the fastest growing region in the forecasted period due to the shifting consumer focus toward smart home automation and new product innovations. The surging demand for the various home improvement products and electronic devices for the personal and professional use is driving the demand for the consumer electronics across the region. The US held the major share in the North American deposition equipment market in 2021, owing to the high disposable income, huge demand for the high-end products, increased adoption rate of the latest

technologies, presence of several leading manufacturers of the electronics, and the high standards of living.

Global Deposition Equipment Market Dynamics:

Growth Drivers: One of the most important factors impacting deposition equipment market dynamics is the growth in consumer electronics industry. Consumer electronics, often known as home electronics, are the devices designed for everyday use, generally in private homes. Semi conductor chips, which are used as components in power devices, compactness optical sensors, and light emitters, are the basic requirement for the manufacturing of these smart electronic devices. The surge in demand for consumer electronics has directly impacted the growth in deposition equipment market, especially due to growth in demand for semiconductor market, which is a major end-user of deposition equipment market. Furthermore, the market has been growing over the past few years, due to factors such as rapid urbanization, rise in automotive industry, escalating use of advanced medical equipment, increasing demand for environmentally friendly coating processes, favourable government support, rising silicon wafer demand, and many other factors.

Challenges: However, the market has been confronted with some challenges specifically, high cost associated with deposition equipment manufacturing, geo political tension, functional defects and complexities, etc. The semiconductor fabrication comprises several processes, beginning with the collection of raw materials, process gases, wafer selection, semiconductor etching process, device production, packaging, and device integration. Each of these processing processes costs a lot of money. The installation of a semiconductor machine is a large investment for firms, as is the maintenance of the machine, which requires regular supervision and testing. Therefore, the high cost associated with deposition equipment manufacturing makes it a challenge for the deposition equipment market.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as increasing penetration of AI applications, increasing demand for electronic vehicles, escalation of internet of things (IoT), emerging industrial robotics, growing global demand for photovoltaic cells, emergence of 5G network, etc. Semiconductors play a critical role in the development and advancement of automotive technology used in connected cars and electrified vehicles. The constantly developing automotive sector offers a ripe opportunity for automotive semiconductors to support higher connectivity, battery performance in EVs, improved sensors, and other technologies. Semiconductors are used in vehicles as microcontrollers to control

emission release and antilock brakes. As autonomous vehicles evolved, semiconductor technology generated chips that are utilized to equip the vehicle with eyes in the form of cameras and sensors located around its exterior. As a result, the growing development of semiconductor chips will drive up the demand for deposition equipment.

Impact Analysis of COVID-19 and Way Forward:

The outbreak of COVID-19 brought in a mixed impact on the overall deposition equipment market, which were majorly positive in nature. Early during the outbreak, several firms had to suspend production completely and this, along with global travel restrictions, meant that there were some severe supply concerns. As economic activity improved, the market for semiconductors recovered swiftly, as corporations began to renew their investments in cloud infrastructure and as artificial intelligence and linked gadgets become increasingly ubiquitous in the society. The sudden increase in demand for semiconductor sector during the second half of 2020 and start of 2021 increased demand for deposition equipment.

Competitive Landscape:

The global deposition equipment market is highly consolidated. The PVD equipment market is almost a monopoly controlled by Applied Materials. The ALD equipment market is led by Tokyo Electron and ASM International. The key players of the global deposition equipment market are

Applied Materials Inc.

Tokyo Electron Limited

Lam Research Corporation

ASM International N.V

Veeco Instruments Inc.

CVD Equipment Corporation

Aixtron SE

B?hler Alzenau

Samco Inc.

Singulus Technologies AG

Plasma-Therm

AJA International, Inc.

Some of the strategies among key players in the market for deposition equipment are product launches, mergers, acquisitions, and collaborations. For instance, in July 2022, ASM International launched TENZATM ALD, an innovative single wafer atomic layer deposition (ALD) process technology for 300mm wafers. TENZATM ALD is optimized for gap-fill applications and provides the best film quality, conformal coverage through the full trench and highest productivity in its class. Whereas, in September 2022, Aixtron SE launched the company's new G10-SiC 200 mm system for high volume manufacturing of latest generation Silicon Carbide ("SiC") power devices on 150/200 mm SiC wafers.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Deposition Equipment: An Overview

2.1.1 Introduction to Deposition Equipment

2.1.2 Comparison of Three Main Types of Deposition

2.2 Deposition Equipment Segmentation: An Overview

2.2.1 Deposition Equipment Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Deposition Equipment Market: An Analysis

3.1.1 Global Deposition Equipment Market: An Overview

3.1.2 Global Deposition Equipment Market by Value

3.1.3 Global Deposition Equipment Market by Type (PECVD, Sputtering PVD, Tubular CVD, Non-tubular LPCVD, ALD, MOCVD, Electroplating ECD, and Other)

3.1.4 Global Deposition Equipment Market by Application (Semiconductor & Microelectronics, Solar Products, Data Storage, Medical Equipment, Cutting Tools, and Other)

3.1.5 Global Deposition Equipment Market by Region (Asia Pacific, North America, Europe, and Rest of the World)

3.2 Global Deposition Equipment Market: Type Analysis

3.2.1 Global Deposition Equipment Market by Type: An Overview

3.2.2 Global PECVD Equipment Market by Value

3.2.3 Global Sputtering PVD Equipment Market by Value

3.2.4 Global Tubular CVD Equipment Market by Value

3.2.5 Global Non-tubular LPCVD Equipment Market by Value

3.2.6 Global ALD Equipment Market by Value

3.2.7 Global MOCVD Equipment Market by Value

3.2.8 Global Electroplating ECD Equipment Market by Value

3.2.9 Global Other Deposition Equipment Market by Value

3.3 Global Deposition Equipment Market: Application Analysis

3.3.1 Global Deposition Equipment Market by Application: An Overview

3.3.2 Global Semiconductor & Microelectronics Deposition Equipment Market by Value

3.3.3 Global Solar Products Deposition Equipment Market by Value

3.3.4 Global Data Storage Deposition Equipment Market by Value

- 3.3.5 Global Medical Deposition Equipment Market by Value
- 3.3.6 Global Cutting Tools Deposition Equipment Market by Value
- 3.3.7 Global Other Deposition Equipment Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Deposition Equipment Market: An Analysis
 - 4.1.1 Asia Pacific Deposition Equipment Market: An Overview
 - 4.1.2 Asia Pacific Deposition Equipment Market by Value
 - 4.1.3 Asia Pacific Deposition Equipment Market by Region (China, Japan, South Korea, and the Rest of Asia Pacific)
 - 4.1.4 China Deposition Equipment Market by Value
 - 4.1.5 Japan Deposition Equipment Market by Value
 - 4.1.6 South Korea Deposition Equipment Market by Value
 - 4.1.7 Rest of Asia Pacific Deposition Equipment Market by Value
- 4.2 North America Deposition Equipment Market: An Analysis
 - 4.2.1 North America Deposition Equipment Market: An Overview
 - 4.2.2 North America Deposition Equipment Market by Value
 - 4.2.3 North America Deposition Equipment Market by Region (The US, Canada, and Mexico)
 - 4.2.4 The US Deposition Equipment Market by Value
 - 4.2.5 Canada Deposition Equipment Market by Value
 - 4.2.6 Mexico Deposition Equipment Market by Value
- 4.3 Europe Deposition Equipment Market: An Analysis
 - 4.3.1 Europe Deposition Equipment Market: An Overview
 - 4.3.2 Europe Deposition Equipment Market by Value
 - 4.3.3 Europe Deposition Equipment Market by Region (Germany, Spain, UK, Italy, France, and the Rest of Europe)
 - 4.3.4 Germany Deposition Equipment Market by Value
 - 4.3.5 Spain Deposition Equipment Market by Value
 - 4.3.6 UK Deposition Equipment Market by Value
 - 4.3.7 Italy Deposition Equipment Market by Value
 - 4.3.8 France Deposition Equipment Market by Value
 - 4.3.9 Rest of Europe Deposition Equipment Market by Value
- 4.4 Rest of the World Deposition Equipment Market: An Analysis
 - 4.4.1 Rest of the World Deposition Equipment Market: An Overview
 - 4.4.2 Rest of the World Deposition Equipment Market by Value

5. IMPACT OF COVID-19

5.1 Impact of COVID-19 on Deposition Equipment Market

5.2 Post COVID-19 Impact on Deposition Equipment Market

6. MARKET DYNAMICS

6.1 Growth Drivers

6.1.1 Rapid Urbanization

6.1.2 Growth in Consumer Electronics Industry

6.1.3 Rise in Automotive Industry

6.1.4 Rising Silicon Wafer Demand

6.1.5 Escalating Use of Advanced Medical Equipment

6.1.6 Increasing Demand for Environmentally Friendly Coating Processes

6.1.7 Favorable Government Support

6.2 Challenges

6.2.1 High Cost Associated with Deposition Equipment Manufacturing

6.2.2 Geo Political Tension

6.2.3 Functional Defects and Complexities

6.3 Market Trends

6.3.1 Increasing Penetration of Artificial Intelligence (AI) Applications

6.3.2 Increasing Demand for Electronic vehicles

6.3.3 Escalation of Internet of Things (IOT)

6.3.4 Emerging Industrial Robotics

6.3.5 Growing Global Demand For Photovoltaic Cells

6.3.6 Emergence of 5G Network

7. COMPETITIVE LANDSCAPE

7.1 Global ALD Equipment Players by Market Share

7.2 Global PVD Equipment Players by Market Share

7.3 Global MOCVD Equipment Players by Market Share

8. COMPANY PROFILES

8.1 Applied Materials Inc.

8.1.1 Business Overview

8.1.2 Operating Segments

8.1.3 Business Strategy

8.2 Tokyo Electron Limited

- 8.2.1 Business Overview
- 8.2.2 Operating Segments
- 8.2.3 Business Strategy
- 8.3 Lam Research Corporation
 - 8.3.1 Business Overview
 - 8.3.2 Operating Regions
 - 8.3.3 Business Strategy
- 8.4 ASM International N.V.
 - 8.4.1 Business Overview
 - 8.4.2 Operating Regions
 - 8.4.3 Business Strategy
- 8.5 Veeco Instruments Inc.
 - 8.5.1 Business Overview
 - 8.5.2 Sales by End-Market
 - 8.5.3 Business Strategy
- 8.6 CVD Equipment Corporation
 - 8.6.1 Business Overview
 - 8.6.2 Operating Segments
 - 8.6.3 Business Strategy
- 8.7 Aixtron SE
 - 8.7.1 Business Overview
 - 8.7.2 Revenues by Goods and Services
 - 8.7.3 Business Strategy
- 8.8 B?hler Alzenau
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategy
- 8.9 Samco Inc.
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Singulus Technologies AG
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 Plasma-Therm
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 AJA International, Inc.
 - 8.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Deposition Equipment Segmentation

Figure 2: Global Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 3: Global Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 4: Global Deposition Equipment Market by Type; 2021 (Percentage, %)

Figure 5: Global Deposition Equipment Market by Application; 2021 (Percentage, %)

Figure 6: Global Deposition Equipment Market by Region; 2021 (Percentage, %)

Figure 7: Global PECVD Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 8: Global PECVD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 9: Global Sputtering PVD Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 10: Global Sputtering PVD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 11: Global Tubular CVD Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 12: Global Tubular CVD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 13: Global Non-tubular LPCVD Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 14: Global Non-tubular LPCVD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 15: Global ALD Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 16: Global ALD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 17: Global MOCVD Equipment Market by Value; 2017-2021 (US\$ Million)

Figure 18: Global MOCVD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 19: Global Electroplating ECD Equipment Market by Value; 2017-2021 (US\$ Million)

Figure 20: Global Electroplating ECD Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 21: Global Other Deposition Equipment Market by Value; 2017-2021 (US\$ Million)

Figure 22: Global Other Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 23: Global Semiconductor & Microelectronics Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 24: Global Semiconductor & Microelectronics Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 25: Global Solar Products Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 26: Global Solar Products Deposition Equipment Market by Value; 2022-2027

(US\$ Billion)

Figure 27: Global Data Storage Deposition Equipment Market by Value; 2017-2021

(US\$ Billion)

Figure 28: Global Data Storage Deposition Equipment Market by Value; 2022-2027

(US\$ Billion)

Figure 29: Global Medical Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 30: Global Medical Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 31: Global Cutting Tools Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 32: Global Cutting Tools Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 33: Global Other Deposition Equipment Market by Value; 2017-2021 (US\$ Million)

Figure 34: Global Other Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 35: Asia Pacific Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 36: Asia Pacific Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 37: Asia Pacific Deposition Equipment Market by Region; 2021 (Percentage, %)

Figure 38: China Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 39: China Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 40: Japan Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 41: Japan Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 42: South Korea Deposition Equipment Market by Value; 2017-2021 (US\$ Million)

Figure 43: South Korea Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 44: Rest of Asia Pacific Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 45: Rest of Asia Pacific Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 46: North America Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

Figure 47: North America Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)

Figure 48: North America Deposition Equipment Market by Region; 2021 (Percentage, %)

Figure 49: The US Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)

- Figure 50: The US Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)
- Figure 51: Canada Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 52: Canada Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 53: Mexico Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 54: Mexico Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 55: Europe Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)
- Figure 56: Europe Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)
- Figure 57: Europe Deposition Equipment Market by Region; 2021 (Percentage, %)
- Figure 58: Germany Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)
- Figure 59: Germany Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)
- Figure 60: Spain Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 61: Spain Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 62: UK Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 63: UK Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 64: Italy Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 65: Italy Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 66: France Deposition Equipment Market by Value; 2017-2021 (US\$ Million)
- Figure 67: France Deposition Equipment Market by Value; 2022-2027 (US\$ Million)
- Figure 68: Rest of Europe Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)
- Figure 69: Rest of Europe Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)
- Figure 70: Rest of the World Deposition Equipment Market by Value; 2017-2021 (US\$ Billion)
- Figure 71: Rest of the World Deposition Equipment Market by Value; 2022-2027 (US\$ Billion)
- Figure 72: Developed Economies and Developing Economies Urban Population; 2016, 2021 & 2050 (Million)
- Figure 73: Global Consumer Electronics Revenue; 2022-2026 (US\$ Billion)
- Figure 74: Global Motor Vehicle Production Statistics by Region; 2018-2021 (Million)
- Figure 75: Global Demand For 300mm Silicon Wafer Market; 2019-2024 (Million Wafer/Month)
- Figure 76: Global Artificial Intelligence Market Revenue; 2020-2023 (US\$ Billion)
- Figure 77: Global Electronic Vehicles Sales; 2017-2021 (Million)
- Figure 78: Global Number of Internet of Things (IOT) Connected Devices; 2019-2024 (Billion)
- Figure 79: Global Annual Installations of Industrial Robots; 2016-2021 (Thousands)
- Figure 80: The US Solar PV Installation Capacity; 2017-2021 (Thousand MWdc)
- Figure 81: Global 5G Mobile Subscription; 2021–2027 (Million)

Figure 82: Global ALD Equipment Players by Market Share; 2021 (Percentage, %)

Figure 83: Global PVD Equipment Players by Market Share; 2021 (Percentage, %)

Figure 84: Global MOCVD Equipment Players by Market Share; 2016-2021
(Percentage, %)

Figure 85: Applied Materials Revenue by Segments; 2022 (Percentage,%)

Figure 86: Tokyo Electron Limited Net Sales by Segments; 2022 (Percentage,%)

Figure 87: Lam Research Corporation Revenue by Region; 2022 (Percentage,%)

Figure 88: ASM International Revenue by Region; 2021 (Percentage,%)

Figure 89: Veeco Instruments Inc. Sales by End-Market; 2021 (Percentage,%)

Figure 90: CVD Equipment Corporation Revenue by Segments; 2021 (Percentage,%)

Figure 91: Aixtron SE Revenues by Goods and Services; 2021 (Percentage,%)

Figure 92: B?hler Alzenau Revenue by Segments; 2021 (Percentage,%)

Table 1: Comparison of Three Main Types of Deposition

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