

# Global Capacitance Diaphragm Vacuum Gauges Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Capacitance Diaphragm Vacuum Gauges market size is expected to reach \$ 205 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

In 2025, global Capacitance Diaphragm Vacuum Gauges sales reached approximately 128,995 Units, with an average global market price of around US\$ 1,025 per Unit.

A Capacitance Diaphragm Vacuum Gauge (CDG) is a high-accuracy absolute pressure (vacuum) instrument that measures pressure by detecting changes in capacitance caused by the deflection of a thin diaphragm. The sensor typically consists of a flexible metal/ceramic diaphragm and a fixed electrode forming a capacitor; as gas pressure varies, the diaphragm deflects slightly, changing the capacitance, which is then converted into a pressure reading. Because the measurement is fundamentally based on mechanical deflection and capacitance rather than gas-dependent ionization effects—and often enhanced by temperature control/compensation to stabilize diaphragm properties—CDGs provide excellent stability, repeatability, and high resolution in the low-pressure range with relatively low sensitivity to gas species. They are widely used in semiconductor vacuum processes, thin-film deposition, etching, vacuum furnaces, and other high-purity vacuum systems for process monitoring and control.

CDGs are typically produced under a 'core in-house + standardized outsourcing' precision-manufacturing model. Critical sensor elements—diaphragm/electrode geometry, hermetic vacuum sealing (weld/braze), and heated temperature control/compensation modules—are commonly developed and manufactured in-house to secure key specs such as zero stability, temperature coefficient, and long-term drift. In

contrast, machined housings, standard vacuum fittings, and selected PCB/cable assemblies are often outsourced to qualified suppliers. Production is usually high-mix/low-volume, with a process chain spanning precision machining and ultrapure cleaning, cleanroom assembly, helium leak testing, thermal aging, segmented multi-point calibration, final consistency verification, and metrology traceability control. The main defensibility is built around 'seal integrity + calibration capability + batch-to-batch consistency.' Indicative gross margins typically fall in the ~40%–60% range; premium semiconductor-grade CDGs (low drift, heated designs, ultra-clean requirements) and strong brand/service offerings can trend higher. When calibration, repair, and spare parts/services are included, blended gross margins often improve further. In the value chain, upstream includes diaphragm films and precision metals, ceramics/insulators, glass-to-metal seals and brazing materials, elastomer/metal seals, and temperature-control and measurement electronics. Midstream covers sensor fabrication, clean assembly, and calibration/metrology. Downstream demand is driven by semiconductor vacuum processes (deposition, etch, thermal steps), vacuum coating/display manufacturing, research vacuum systems, and vacuum furnaces—often complemented by recurring aftermarket revenue from calibration and maintenance services.

### Market Development Opportunities & Main Driving Factors

As global wafer-fab and advanced-packaging build-outs accelerate, vacuum process platforms are allocating more budget to high-accuracy absolute pressure references—creating a direct tailwind for capacitance diaphragm vacuum gauges. With tighter process windows and increasing recipe complexity in deposition, etch, and thermal steps, chamber pressure stability and repeatability translate into yield and OEE outcomes, pushing downstream preferences from 'works' to 'high-stability, low-drift, and traceable.' In annual reports, leading vendors repeatedly underline the strategic importance of their vacuum and pressure control solutions for semiconductor manufacturing, alongside sustained investment in product refresh, performance upgrades, and customer adoption. Combined with industrial policies and localization efforts in selected regions, premium metrology is increasingly shifting from an optional accessory to a mission-critical component, strengthening the long-term growth narrative.

### Market Challenges, Risks, & Restraints

This market is tightly linked to semiconductor capex cycles, so demand swings can quickly affect order cadence and pricing. During downturns, customers may extend maintenance intervals and reduce spending on spares and upgrades, pressuring both

revenue and margins. On the technical side, semiconductor-grade CDGs require long qualification cycles and tight process matching; any zero drift, contamination residue, or seal reliability issue can be perceived as a line-stop risk—forcing continuous investment in materials, clean manufacturing, batch consistency, calibration systems, and global service networks. External uncertainties include rising costs in critical materials and precision manufacturing, supply-chain disruptions, and intensified competition driven by localization, which may pull ASPs downward.

### Downstream Demand Trends

Downstream procurement is evolving toward a dual-track pattern: standardized configurations through equipment OEMs, alongside more granular selection by fabs. OEM integration increasingly favors digital interfaces and system interoperability so pressure data can be embedded into tool control and closed-loop process analytics. Fabs, meanwhile, prioritize batch-to-batch consistency, long-term drift performance, and traceable calibration to reduce hidden risks from changeovers and maintenance. On the product side, heated designs, low-drift architectures, anti-contamination features, and higher-grade clean assembly are becoming mainstream upgrade directions. Commercially, revenue is shifting toward services—calibration, repair, spares, and process diagnostics—making 'metrology capability + delivery and response speed' a core supplier threshold and gradually steering the industry from one-off product sales to a 'product + services' value model.

This report studies the global Capacitance Diaphragm Vacuum Gauges production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Capacitance Diaphragm Vacuum Gauges and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Capacitance Diaphragm Vacuum Gauges that contribute to its increasing demand across many markets.

### Highlights and key features of the study

Global Capacitance Diaphragm Vacuum Gauges total production and demand, 2021-2032, (Units)

Global Capacitance Diaphragm Vacuum Gauges total production value, 2021-2032, (USD Million)

Global Capacitance Diaphragm Vacuum Gauges production by region & country,

production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Capacitance Diaphragm Vacuum Gauges consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Capacitance Diaphragm Vacuum Gauges domestic production, consumption, key domestic manufacturers and share

Global Capacitance Diaphragm Vacuum Gauges production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Capacitance Diaphragm Vacuum Gauges production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Capacitance Diaphragm Vacuum Gauges production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Capacitance Diaphragm Vacuum Gauges market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include MKS Instruments, INFICON, Atlas Copco (Leybold and Edwards), ZHENTAI INSTRUMENT, Chengdu Zhenghua Electronic Instrument, Setra Systems, Brooks Instrument, Azbil, Pfeiffer Vacuum+Fab Solutions (Busch), Horiba, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Capacitance Diaphragm Vacuum Gauges market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Capacitance Diaphragm Vacuum Gauges Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Capacitance Diaphragm Vacuum Gauges Market, Segmentation by Type:

Unheated Type

Heated Type

Global Capacitance Diaphragm Vacuum Gauges Market, Segmentation by Scale Range:

0.01-1 Torr

1-10 Torr

10-100 Torr

100-1000 Torr

More than 1000 Torr

Global Capacitance Diaphragm Vacuum Gauges Market, Segmentation by Measurement Principle:

Absolute CDG

Differential CDG

Global Capacitance Diaphragm Vacuum Gauges Market, Segmentation by Diaphragm Material:

Metal

Ceramic

Global Capacitance Diaphragm Vacuum Gauges Market, Segmentation by Application:

Semiconductor Equipment

Photovoltaics and Displays

Medical and Pharmaceutical

Food Industry

Others

Companies Profiled:

MKS Instruments

INFICON

Atlas Copco (Leybold and Edwards)

ZHENTAI INSTRUMENT

Chengdu Zhenghua Electronic Instrument

Setra Systems

Brooks Instrument

Azbil

Pfeiffer Vacuum+Fab Solutions (Busch)

Horiba

Canon Anelva

ULVAC

Chengdu Reborn

Agilent

Kurt J. Lesker

EBARA

Shanghai chenyi-pmi

ASAIR

Atovac

SATO VAC

Qingdao Xinnovis Microsystem Technology

VMT Instrument

### **Key Questions Answered:**

1. How big is the global Capacitance Diaphragm Vacuum Gauges market?
2. What is the demand of the global Capacitance Diaphragm Vacuum Gauges market?
3. What is the year over year growth of the global Capacitance Diaphragm Vacuum Gauges market?

4. What is the production and production value of the global Capacitance Diaphragm Vacuum Gauges market?
5. Who are the key producers in the global Capacitance Diaphragm Vacuum Gauges market?
6. What are the growth factors driving the market demand?

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