

Global Hot Cathode Vacuum Gauge Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hot Cathode Vacuum Gauge market size is expected to reach \$ 187 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

In 2025, global Hot Cathode Vacuum Gauge production reached approximately 107,183 Units. The average price is approximately \$1,200. A hot-cathode ionization vacuum gauge is an ionization-based pressure measurement device designed primarily for high-vacuum, ultra-high-vacuum and selected extreme-high-vacuum environments. Its core architecture typically consists of a heated cathode or filament, an anode grid, an ion collector, a gauge envelope or nude gauge structure, emission control electronics, ion-current measurement circuitry, a gauge controller and signal output interface.

Based on our research, the hot-cathode ionization vacuum gauge market should be treated as a narrow and professional segment of the vacuum measurement industry rather than as a broad vacuum gauge category. The correct statistical boundary is built around hot-cathode electron emission, ionization pressure measurement, gauge heads or tubes, active transducers, combination full-range gauges and dedicated controllers. Standalone Pirani gauges, cold-cathode gauges, capacitance diaphragm gauges, residual gas analyzers and complete vacuum systems should be separated from this scope. The core technology is mature, and Bayard-Alpert gauges, triode-type gauges, nude UHV gauges and glass-tubulated gauge tubes remain the dominant product architectures. However, the product continues to be essential in semiconductor process tools, thin-film deposition systems, scientific UHV platforms, mass spectrometry, electron microscopy and other precision vacuum applications. Growth is therefore not driven by consumer-like volume expansion, but by high-end equipment upgrades, installed-base replacement, OEM integration and regional supply-chain substitution.

From the supply side, the global market is structurally concentrated in North America, Europe and Japan, while China is increasingly visible in gauge tubes, controllers and medium-to-high-vacuum replacement products. MKS / Granville-Phillips, INFICON, Atlas Copco through Edwards and Leybold, Pfeiffer, Agilent, ULVAC and Canon ANELVA form the global high-end supplier group, with strengths in active gauges, Bayard-Alpert designs, combination gauges and established semiconductor or research customers. Thyracont, The Fredericks Company / Televac, Kurt J. Lesker, Stanford Research Systems, MDC Precision and Duniway represent specialized suppliers serving UHV, research and replacement markets. In China, Chengdu Guoguang, Chengdu Zhenghua, Chengdu Reborn and Hangzhou Pangu provide identifiable local supply, especially in ZJ-series gauge tubes, controllers and industrial vacuum applications. The gap between the broad supplier pool and the core formal list mainly reflects differences in official product evidence, manufacturing ownership, financial transparency and product positioning.

Demand is concentrated in equipment and research-driven markets rather than in general industrial instrumentation. Semiconductor process equipment and vacuum coating tools are the most important cyclical growth sources, but installed-base replacement in research laboratories, UHV systems, analytical instruments, vacuum furnaces and industrial vacuum equipment remains a stable demand base. As semiconductor capital expenditure normalizes, mature-node equipment, advanced packaging tools, display coating systems and surface-science platforms are expected to support steady growth in hot-cathode gauge demand. At the product level, customers increasingly prefer active transducers, full-range gauges combining Pirani and hot-cathode measurement, digital communication interfaces, automatic filament switching, degassing control, contamination protection and better serviceability. Cold-cathode gauges and other sensors will continue to compete in lower-maintenance or more contaminated environments, but hot-cathode ionization gauges should retain a defensible position in clean high-vacuum, ultra-high-vacuum and traceable precision measurement applications.

This report studies the global Hot Cathode Vacuum Gauge production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hot Cathode Vacuum Gauge 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 Hot Cathode Vacuum Gauge

that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hot Cathode Vacuum Gauge total production and demand, 2021-2032, (K Units)

Global Hot Cathode Vacuum Gauge total production value, 2021-2032, (USD Million)

Global Hot Cathode Vacuum Gauge production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Hot Cathode Vacuum Gauge consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Hot Cathode Vacuum Gauge domestic production, consumption, key domestic manufacturers and share

Global Hot Cathode Vacuum Gauge production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Hot Cathode Vacuum Gauge production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Hot Cathode Vacuum Gauge production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Hot Cathode Vacuum Gauge 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 Inc., INFICON, Atlas Copco Group, Agilent Technologies, Pfeiffer Vacuum, ULVAC, Inc., Canon ANELVA, Thyracont Vacuum Instruments, Chengdu Guoguang Electric, The Fredericks Company, 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 Hot Cathode Vacuum Gauge market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (USD/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 Hot Cathode Vacuum Gauge Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hot Cathode Vacuum Gauge Market, Segmentation by Type:

Triode-Type Hot-Cathode Ionization Vacuum Gauge

Suppression-Type Hot-Cathode Ionization Vacuum Gauge

Others

Global Hot Cathode Vacuum Gauge Market, Segmentation by Mounting Method:

Glass Tube Type

Naked Gauge Type

Flange Type

Others

Global Hot Cathode Vacuum Gauge Market, Segmentation by Measurement Range:

High Vacuum Type: 1×10^{-2} – 1×10^{-5} Pa

Ultra-High Vacuum Type: 1×10^{-5} – 1×10^{-9} Pa

Extreme Vacuum Type: 1×10^{-9} – 1×10^{-12} Pa

Global Hot Cathode Vacuum Gauge Market, Segmentation by Application:

Semiconductor Manufacturing

Display Panel Manufacturing

Photovoltaic Industry

Others

Companies Profiled:

MKS Inc.

INFICON

Atlas Copco Group

Agilent Technologies

Pfeiffer Vacuum

ULVAC, Inc.

Canon ANELVA

Thyracont Vacuum Instruments

Chengdu Guoguang Electric

The Fredericks Company

Kurt J. Lesker Company

Stanford Research Systems

CHENGDU ZHENGHUA

MDC Precision

Duniway Stockroom

Chengdu Reborn Electronic Technology

Ideal Vacuum Products

ATOVAC Co., Ltd.

LDS Vacuum Products

Key Questions Answered:

1. How big is the global Hot Cathode Vacuum Gauge market?
2. What is the demand of the global Hot Cathode Vacuum Gauge market?
3. What is the year over year growth of the global Hot Cathode Vacuum Gauge market?
4. What is the production and production value of the global Hot Cathode Vacuum Gauge market?
5. Who are the key producers in the global Hot Cathode Vacuum Gauge market?
6. What are the growth factors driving the market demand?

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