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Global Plasma Etch Endpoint Detection System Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GFFB7766B07AEN.html
Date: November 2026
Pages: 117
Price: US$ 4,480.00 (Single User License)
ID: GFFB7766B07AEN

Abstracts

The global Plasma Etch Endpoint Detection System market size is expected to reach $ 517 million by 2032, rising at a market growth of 11.5% CAGR during the forecast period (2026-2032).

Plasma Etch Endpoint Detection Systems are dedicated process-monitoring and control solutions used to determine when a target material layer has reached the required etch endpoint during plasma-based semiconductor fabrication. These systems acquire and analyze real-time changes in plasma emission, wafer-surface optical response, RF electrical characteristics, or reaction-gas composition, and then generate endpoint signals for process control. The market covers complete endpoint detection systems, detector and sensor modules, spectroscopy and analyzer subsystems, and separately identifiable endpoint controllers and software. Major technology routes include optical emission spectroscopy (OES), interferometric and reflectometric optical detection, RF electrical sensing, gas analysis and mass spectrometry, and hybrid multi-sensor detection. Products are deployed as OEM-integrated modules, retrofit and upgrade systems, or standalone process-monitoring platforms. The principal applications are plasma etching of silicon and silicon-based semiconductor materials, dielectric films, conductive materials, compound semiconductors, and selected organic layers for logic ICs, memory ICs, power and compound semiconductor devices, MEMS and sensors, photomasks, and specialty microfabrication. The market is fundamentally a specialized semiconductor process-control equipment segment in which detection sensitivity, real-time response, algorithm robustness, chamber compatibility, and integration with etch-tool control architectures determine product competitiveness.

Key FindingsThe global weighted average selling price in 2025 was approximately US$25,000–40,000 per unit.Optical Emission Spectroscopy (OES) remains the largest

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detection technology segment.RF sensing, gas analysis, and mass spectrometry monitoring are gaining importance.Logic ICs and memory ICs are the major high-value downstream applications.Europe has the highest concentration of specialized suppliers, while China’s domestic supply base is developing rapidly.

Market Trends

The most important technology trend is the transition from relatively simple endpoint monitoring toward richer real-time process intelligence. OES remains the commercial baseline, but increasingly demanding etch environments are encouraging combinations of spectral information, interferometry, RF signatures, gas composition and advanced analytical software. Current commercial systems already demonstrate OES/interferometry combinations, non-invasive RF monitoring and molecular-level gas analysis, indicating that competitive differentiation is progressively moving from sensor hardware alone toward signal quality, multivariate analytics and control algorithms.

Another major trend is closer integration between endpoint detection, chamber-health monitoring, fault detection and advanced process control. This does not change the endpoint-detection market boundary, but it raises the strategic value of EPD data within the broader fab-control architecture. Suppliers capable of converting endpoint signals into repeatable, actionable process decisions are therefore positioned more favorably than vendors supplying only generic spectroscopy hardware.

Market Dynamics

Drivers

The primary demand driver is rising etch complexity rather than wafer-capacity expansion alone. GAA logic, advanced DRAM and increasingly tall 3D NAND structures require deeper, more selective and more precisely controlled etch processes. Lam Research notes that the industry transition toward three-dimensional device architectures is materially increasing deposition and etch intensity, while SEMI expects continued expansion in Logic & Micro and memory manufacturing investment. These trends support both new-tool EPD installation and upgrades to higher-sensitivity endpoint-control technologies.

Restraints

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The principal restraint is that endpoint detection is frequently embedded within the etch-tool architecture rather than purchased as a standardized standalone product. Qualification cycles are long, process recipes are highly tool-specific, and fabs generally avoid replacing proven sensing architectures unless the yield, uptime or process-window benefit is compelling. OES also remains technically adequate for many mature applications, limiting the speed at which higher-cost RF, mass-spectrometry or hybrid systems can displace existing installations.

Opportunities

Low-open-area etch represents an important technology opportunity because conventional optical signals can become difficult to distinguish as exposed reacting surface area decreases. Non-invasive RF monitoring and multivariate analytical methods provide alternative signal domains, while mass-spectrometry-based systems can identify subtle changes in process species and reaction by-products. Retrofit deployment is another attractive opportunity because certain sensing technologies can be added to existing plasma tools without extensive chamber redesign.

Compound semiconductors, MEMS and specialty microfabrication provide a second growth avenue. These applications often involve smaller production volumes than mainstream logic or memory but can require highly precise depth or layer-selective endpoint control. Laser interferometry and other in-situ optical metrology technologies are particularly suitable where direct monitoring of film thickness or etch depth provides stronger process information than plasma-emission intensity alone.

Challenges

The central technical challenge is maintaining reliable endpoint recognition as process signals weaken and device structures become more complex. Changes in chamber condition, optical-window contamination, recipe drift, plasma instability and small exposed areas can reduce signal-to-noise ratios and increase false endpoint risk. Advanced sensors can mitigate these issues but also introduce additional calibration, data-processing and integration requirements. The competitive challenge is therefore increasingly defined by repeatability under high-volume production conditions rather than laboratory detection sensitivity alone.

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Industry Chain Analysis

The upstream industry includes spectrometers, optical filters, photodetectors, lasers, optical fibers and viewports, RF sensors, vacuum and gas-sampling components, mass-analysis hardware, data-acquisition electronics, industrial computers and analytical software. Midstream suppliers integrate these components into endpoint detectors, sensor modules, analyzer subsystems or complete endpoint-control platforms. Downstream customers consist primarily of plasma etch equipment OEMs, semiconductor fabs, research and pilot lines, compound semiconductor manufacturers, MEMS producers and specialty microfabrication facilities. The supply chain therefore combines precision optical and electronic instrumentation with semiconductor-equipment qualification and process-control expertise.

Value Chain Analysis

Hardware remains essential, but a growing portion of differentiated value is created after signal acquisition. Optical or RF signals must be converted into robust endpoint indicators, filtered against production fluctuations and integrated with recipes, chamber states and equipment control systems. As process complexity increases, software, algorithms, signal fusion, calibration know-how and OEM integration become more important sources of competitive differentiation. Suppliers able to provide sensor hardware together with production-proven analytics and control integration can therefore capture greater system-level value than suppliers focused mainly on generic spectroscopy components.

Segment Insights

By detection technology, OES remains the largest segment and the principal installed-base technology. Interferometric and reflectometric optical detection occupies an important position in processes requiring direct depth or film-thickness monitoring. RF sensing is developing as an alternative for weak optical signals and low-open-area processes, while gas analysis and mass spectrometry occupy higher-specialization applications requiring greater chemical specificity. Hybrid and multi-sensor detection represents an important technology direction as process complexity increases.

By product form, complete endpoint detection systems, detector and sensor modules, spectroscopy and analyzer subsystems, and endpoint controllers and software form the principal commercial categories. By deployment mode, OEM-integrated systems and retrofit or upgrade solutions represent the two most commercially important approaches,

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while standalone monitoring platforms retain relevance in process development, specialty manufacturing and R&D environments.

Downstream Market Opportunities

Advanced logic and memory represent the most significant opportunities for high-performance endpoint detection. GAA transistor manufacturing, advanced DRAM and higher-layer 3D NAND require tighter control of critical etch steps and increasingly challenging three-dimensional features. SEMI expects Logic & Micro to remain the largest 300 mm equipment-spending segment, while memory investment is accelerating alongside HBM, advanced DRAM and higher-layer NAND demand.

Power and compound semiconductors, MEMS and specialty devices provide smaller but technically attractive opportunities because customers often prioritize process precision, depth control and reproducibility over throughput alone. These markets can support specialized interferometric, reflectometric and multi-sensor configurations, particularly where conventional OES signals provide limited endpoint contrast.

Regional Insights

Asia remains the largest downstream demand center because semiconductor fabrication capacity is concentrated in China, Taiwan, South Korea and Japan. SEMI expects China to maintain the world's largest installed semiconductor capacity in 2026 and 2027, while Taiwan, South Korea and Japan remain major advanced logic, memory and specialty-device manufacturing regions. Continued fab construction and technology migration across these markets support demand for both integrated endpoint detection and retrofit process-control systems.

From the supply side, Europe has a particularly strong concentration of independent specialist EPD manufacturers covering OES, interferometry and RF technologies. Japan maintains an established optical, spectroscopy and semiconductor-instrumentation supply base, while North America is strong in advanced process control, RF sensing and semiconductor-equipment integration. China is emerging as an important localization market, with domestic suppliers moving from spectroscopy subsystems toward dedicated OES and interferometric endpoint-detection products.

Competitive Landscape Analysis

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The competitive landscape is highly specialized and differs materially by region. European competition is characterized by a relatively dense group of independent process-monitoring specialists with strong positions in optical and RF-based technologies. Japan benefits from established semiconductor instrumentation, photonics and optical-monitoring capabilities, while North America has strengths in process-control integration, RF sensing and close alignment with major semiconductor equipment architectures. China remains at an earlier stage of specialist supplier development but is advancing through domestic substitution, fab qualification and locally developed OES and interferometric solutions.

Competition is increasingly shifting away from basic sensor availability toward production-level performance. Key differentiators include endpoint sensitivity at low signal levels, robustness against chamber drift, compatibility with multiple plasma tools, multi-chamber scalability, real-time data processing, algorithm capability and integration with fab process-control software. This favors suppliers that combine semiconductor-qualified hardware with application knowledge and control algorithms rather than manufacturers of generic analytical instruments alone.

Report Scope

This report studies the global Plasma Etch Endpoint Detection System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Plasma Etch Endpoint Detection System 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 Plasma Etch Endpoint Detection System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Plasma Etch Endpoint Detection System total production and demand, 2021-2032, (Units)

Global Plasma Etch Endpoint Detection System total production value, 2021-2032, (USD Million)

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Global Plasma Etch Endpoint Detection System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Plasma Etch Endpoint Detection System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Plasma Etch Endpoint Detection System domestic production, consumption, key domestic manufacturers and share

Global Plasma Etch Endpoint Detection System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Plasma Etch Endpoint Detection System production by Detection Technology, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Plasma Etch Endpoint Detection System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Plasma Etch Endpoint Detection System 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 HORIBA, Ltd., Verity Instruments, Inc., INFICON Holding AG, MKS Inc., Hamamatsu Photonics K.K., PLASUS GmbH, LayTec AG, SENTECH Instruments GmbH, Intellemetrics Global Ltd, Impedans Ltd., 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 Plasma Etch Endpoint Detection System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by

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manufacturer, by Detection Technology, 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 Plasma Etch Endpoint Detection System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Plasma Etch Endpoint Detection System Market, Segmentation by Detection Technology:

Optical Emission Spectroscopy (OES)

Interferometric and Reflectometric Optical Detection

RF Electrical Sensing

Gas Analysis and Mass Spectrometry

Hybrid and Multi-sensor Detection

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Others

Global Plasma Etch Endpoint Detection System Market, Segmentation by Etched Material:

Silicon and Silicon-based Semiconductor Materials

Dielectric Materials

Metals and Conductive Materials

Compound Semiconductor Materials

Photoresist and Organic Materials

Others

Global Plasma Etch Endpoint Detection System Market, Segmentation by Chamber Configuration:

Single-chamber Systems

Multi-chamber and Cluster-tool Systems

Others

Global Plasma Etch Endpoint Detection System Market, Segmentation by Application:

Logic ICs

Memory ICs

Power and Compound Semiconductor Devices

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MEMS and Sensors

Photomask and Specialty Microfabrication

Others

Companies Profiled:

HORIBA, Ltd.

Verity Instruments, Inc.

INFICON Holding AG

MKS Inc.

Hamamatsu Photonics K.K.

PLASUS GmbH

LayTec AG

SENTECH Instruments GmbH

Intellemetrics Global Ltd

Impedans Ltd.

Atonarp Inc.

Shanghai CheYiTian Technology Ltd.

Shanghai Ideaoptics Instruments Co., Ltd.

Key Questions Answered

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1. How big is the global Plasma Etch Endpoint Detection System market?
2. What is the demand of the global Plasma Etch Endpoint Detection System market?
3. What is the year over year growth of the global Plasma Etch Endpoint Detection System market?
4. What is the total value of the global Plasma Etch Endpoint Detection System market?
5. Who are the Major Players in the global Plasma Etch Endpoint Detection System market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Plasma Etch Endpoint Detection System Introduction
1.2 World Plasma Etch Endpoint Detection System Supply & Forecast
  1.2.1 World Plasma Etch Endpoint Detection System Production Value (2021 & 2025 & 2032)
  1.2.2 World Plasma Etch Endpoint Detection System Production (2021-2032)
  1.2.3 World Plasma Etch Endpoint Detection System Pricing Trends (2021-2032)
1.3 World Plasma Etch Endpoint Detection System Production by Region (Based on Production Site)
  1.3.1 World Plasma Etch Endpoint Detection System Production Value by Region (2021-2032)
  1.3.2 World Plasma Etch Endpoint Detection System Production by Region (2021-2032)
  1.3.3 World Plasma Etch Endpoint Detection System Average Price by Region (2021-2032)
  1.3.4 North America Plasma Etch Endpoint Detection System Production (2021-2032)
  1.3.5 Europe Plasma Etch Endpoint Detection System Production (2021-2032)
  1.3.6 China Plasma Etch Endpoint Detection System Production (2021-2032)
  1.3.7 Japan Plasma Etch Endpoint Detection System Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Plasma Etch Endpoint Detection System Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Plasma Etch Endpoint Detection System Major Market Trends

2 DEMAND SUMMARY

2.1 World Plasma Etch Endpoint Detection System Demand (2021-2032)
2.2 World Plasma Etch Endpoint Detection System Consumption by Region
  2.2.1 World Plasma Etch Endpoint Detection System Consumption by Region (2021-2026)
  2.2.2 World Plasma Etch Endpoint Detection System Consumption Forecast by Region (2027-2032)
2.3 United States Plasma Etch Endpoint Detection System Consumption (2021-2032)
2.4 China Plasma Etch Endpoint Detection System Consumption (2021-2032)
2.5 Europe Plasma Etch Endpoint Detection System Consumption (2021-2032)
2.6 Japan Plasma Etch Endpoint Detection System Consumption (2021-2032)

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2.7 South Korea Plasma Etch Endpoint Detection System Consumption (2021-2032)
2.8 ASEAN Plasma Etch Endpoint Detection System Consumption (2021-2032)
2.9 India Plasma Etch Endpoint Detection System Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Plasma Etch Endpoint Detection System Production Value by Manufacturer (2021-2026)
3.2 World Plasma Etch Endpoint Detection System Production by Manufacturer (2021-2026)
3.3 World Plasma Etch Endpoint Detection System Average Price by Manufacturer (2021-2026)
3.4 Plasma Etch Endpoint Detection System Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Plasma Etch Endpoint Detection System Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Plasma Etch Endpoint Detection System in 2025
  3.5.3 Global Concentration Ratios (CR8) for Plasma Etch Endpoint Detection System in 2025
3.6 Plasma Etch Endpoint Detection System Market: Overall Company Footprint Analysis
  3.6.1 Plasma Etch Endpoint Detection System Market: Region Footprint
  3.6.2 Plasma Etch Endpoint Detection System Market: Company Product Type Footprint
  3.6.3 Plasma Etch Endpoint Detection System Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Plasma Etch Endpoint Detection System Production Value Comparison
  4.1.1 United States VS China: Plasma Etch Endpoint Detection System Production

+357 96 030922
info@marketpublishers.com

Value Comparison (2021 & 2025 & 2032)
4.1.2 United States VS China: Plasma Etch Endpoint Detection System Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Plasma Etch Endpoint Detection System Production Comparison
4.2.1 United States VS China: Plasma Etch Endpoint Detection System Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Plasma Etch Endpoint Detection System Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Plasma Etch Endpoint Detection System Consumption Comparison
4.3.1 United States VS China: Plasma Etch Endpoint Detection System Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: Plasma Etch Endpoint Detection System Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Plasma Etch Endpoint Detection System Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Plasma Etch Endpoint Detection System Production Value (2021-2026)
4.4.3 United States Based Manufacturers Plasma Etch Endpoint Detection System Production (2021-2026)
4.5 China Based Plasma Etch Endpoint Detection System Manufacturers and Market Share
4.5.1 China Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Plasma Etch Endpoint Detection System Production Value (2021-2026)
4.5.3 China Based Manufacturers Plasma Etch Endpoint Detection System Production (2021-2026)
4.6 Rest of World Based Plasma Etch Endpoint Detection System Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production (2021-2026)

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5 MARKET ANALYSIS BY DETECTION TECHNOLOGY

5.1 World Plasma Etch Endpoint Detection System Market Size Overview by Detection Technology: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Detection Technology
  5.2.1 Optical Emission Spectroscopy (OES)
  5.2.2 Interferometric and Reflectometric Optical Detection
  5.2.3 RF Electrical Sensing
  5.2.4 Gas Analysis and Mass Spectrometry
  5.2.5 Hybrid and Multi-sensor Detection
  5.2.6 Others
5.3 Market Segment by Detection Technology
  5.3.1 World Plasma Etch Endpoint Detection System Production by Detection Technology (2021-2032)
  5.3.2 World Plasma Etch Endpoint Detection System Production Value by Detection Technology (2021-2032)
  5.3.3 World Plasma Etch Endpoint Detection System Average Price by Detection Technology (2021-2032)

6 MARKET ANALYSIS BY ETCHED MATERIAL

6.1 World Plasma Etch Endpoint Detection System Market Size Overview by Etched Material: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Etched Material
  6.2.1 Silicon and Silicon-based Semiconductor Materials
  6.2.2 Dielectric Materials
  6.2.3 Metals and Conductive Materials
  6.2.4 Compound Semiconductor Materials
  6.2.5 Photoresist and Organic Materials
  6.2.6 Others
6.3 Market Segment by Etched Material
  6.3.1 World Plasma Etch Endpoint Detection System Production by Etched Material (2021-2032)
  6.3.2 World Plasma Etch Endpoint Detection System Production Value by Etched Material (2021-2032)
  6.3.3 World Plasma Etch Endpoint Detection System Average Price by Etched Material (2021-2032)

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info@marketpublishers.com

7 MARKET ANALYSIS BY CHAMBER CONFIGURATION

7.1 World Plasma Etch Endpoint Detection System Market Size Overview by Chamber Configuration: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Chamber Configuration
  7.2.1 Single-chamber Systems
  7.2.2 Multi-chamber and Cluster-tool Systems
  7.2.3 Others
7.3 Market Segment by Chamber Configuration
  7.3.1 World Plasma Etch Endpoint Detection System Production by Chamber Configuration (2021-2032)
  7.3.2 World Plasma Etch Endpoint Detection System Production Value by Chamber Configuration (2021-2032)
  7.3.3 World Plasma Etch Endpoint Detection System Average Price by Chamber Configuration (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Plasma Etch Endpoint Detection System Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Logic ICs
  8.2.2 Memory ICs
  8.2.3 Power and Compound Semiconductor Devices
  8.2.4 MEMS and Sensors
  8.2.5 Photomask and Specialty Microfabrication
  8.2.6 Others
8.3 Market Segment by Application
  8.3.1 World Plasma Etch Endpoint Detection System Production by Application (2021-2032)
  8.3.2 World Plasma Etch Endpoint Detection System Production Value by Application (2021-2032)
  8.3.3 World Plasma Etch Endpoint Detection System Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 HORIBA, Ltd.
  9.1.1 HORIBA, Ltd. Details

+357 96 030922
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9.1.2 HORIBA, Ltd. Major Business
9.1.3 HORIBA, Ltd. Plasma Etch Endpoint Detection System Product and Services
9.1.4 HORIBA, Ltd. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 HORIBA, Ltd. Recent Developments/Updates
9.1.6 HORIBA, Ltd. Competitive Strengths & Weaknesses
9.2 Verity Instruments, Inc.
9.2.1 Verity Instruments, Inc. Details
9.2.2 Verity Instruments, Inc. Major Business
9.2.3 Verity Instruments, Inc. Plasma Etch Endpoint Detection System Product and Services
9.2.4 Verity Instruments, Inc. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Verity Instruments, Inc. Recent Developments/Updates
9.2.6 Verity Instruments, Inc. Competitive Strengths & Weaknesses
9.3 INFICON Holding AG
9.3.1 INFICON Holding AG Details
9.3.2 INFICON Holding AG Major Business
9.3.3 INFICON Holding AG Plasma Etch Endpoint Detection System Product and Services
9.3.4 INFICON Holding AG Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 INFICON Holding AG Recent Developments/Updates
9.3.6 INFICON Holding AG Competitive Strengths & Weaknesses
9.4 MKS Inc.
9.4.1 MKS Inc. Details
9.4.2 MKS Inc. Major Business
9.4.3 MKS Inc. Plasma Etch Endpoint Detection System Product and Services
9.4.4 MKS Inc. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 MKS Inc. Recent Developments/Updates
9.4.6 MKS Inc. Competitive Strengths & Weaknesses
9.5 Hamamatsu Photonics K.K.
9.5.1 Hamamatsu Photonics K.K. Details
9.5.2 Hamamatsu Photonics K.K. Major Business
9.5.3 Hamamatsu Photonics K.K. Plasma Etch Endpoint Detection System Product and Services
9.5.4 Hamamatsu Photonics K.K. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)

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info@marketpublishers.com

9.5.5 Hamamatsu Photonics K.K. Recent Developments/Updates
9.5.6 Hamamatsu Photonics K.K. Competitive Strengths & Weaknesses
9.6 PLASUS GmbH
9.6.1 PLASUS GmbH Details
9.6.2 PLASUS GmbH Major Business
9.6.3 PLASUS GmbH Plasma Etch Endpoint Detection System Product and Services
9.6.4 PLASUS GmbH Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 PLASUS GmbH Recent Developments/Updates
9.6.6 PLASUS GmbH Competitive Strengths & Weaknesses
9.7 LayTec AG
9.7.1 LayTec AG Details
9.7.2 LayTec AG Major Business
9.7.3 LayTec AG Plasma Etch Endpoint Detection System Product and Services
9.7.4 LayTec AG Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 LayTec AG Recent Developments/Updates
9.7.6 LayTec AG Competitive Strengths & Weaknesses
9.8 SENTECH Instruments GmbH
9.8.1 SENTECH Instruments GmbH Details
9.8.2 SENTECH Instruments GmbH Major Business
9.8.3 SENTECH Instruments GmbH Plasma Etch Endpoint Detection System Product and Services
9.8.4 SENTECH Instruments GmbH Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 SENTECH Instruments GmbH Recent Developments/Updates
9.8.6 SENTECH Instruments GmbH Competitive Strengths & Weaknesses
9.9 Intellemetrics Global Ltd
9.9.1 Intellemetrics Global Ltd Details
9.9.2 Intellemetrics Global Ltd Major Business
9.9.3 Intellemetrics Global Ltd Plasma Etch Endpoint Detection System Product and Services
9.9.4 Intellemetrics Global Ltd Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Intellemetrics Global Ltd Recent Developments/Updates
9.9.6 Intellemetrics Global Ltd Competitive Strengths & Weaknesses
9.10 Impedans Ltd.
9.10.1 Impedans Ltd. Details
9.10.2 Impedans Ltd. Major Business

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9.10.3 Impedans Ltd. Plasma Etch Endpoint Detection System Product and Services
9.10.4 Impedans Ltd. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Impedans Ltd. Recent Developments/Updates
9.10.6 Impedans Ltd. Competitive Strengths & Weaknesses
9.11 Atonarp Inc.
9.11.1 Atonarp Inc. Details
9.11.2 Atonarp Inc. Major Business
9.11.3 Atonarp Inc. Plasma Etch Endpoint Detection System Product and Services
9.11.4 Atonarp Inc. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Atonarp Inc. Recent Developments/Updates
9.11.6 Atonarp Inc. Competitive Strengths & Weaknesses
9.12 Shanghai CheYiTian Technology Ltd.
9.12.1 Shanghai CheYiTian Technology Ltd. Details
9.12.2 Shanghai CheYiTian Technology Ltd. Major Business
9.12.3 Shanghai CheYiTian Technology Ltd. Plasma Etch Endpoint Detection System Product and Services
9.12.4 Shanghai CheYiTian Technology Ltd. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Shanghai CheYiTian Technology Ltd. Recent Developments/Updates
9.12.6 Shanghai CheYiTian Technology Ltd. Competitive Strengths & Weaknesses
9.13 Shanghai Ideaoptics Instruments Co., Ltd.
9.13.1 Shanghai Ideaoptics Instruments Co., Ltd. Details
9.13.2 Shanghai Ideaoptics Instruments Co., Ltd. Major Business
9.13.3 Shanghai Ideaoptics Instruments Co., Ltd. Plasma Etch Endpoint Detection System Product and Services
9.13.4 Shanghai Ideaoptics Instruments Co., Ltd. Plasma Etch Endpoint Detection System Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Shanghai Ideaoptics Instruments Co., Ltd. Recent Developments/Updates
9.13.6 Shanghai Ideaoptics Instruments Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Plasma Etch Endpoint Detection System Industry Chain
10.2 Plasma Etch Endpoint Detection System Upstream Analysis
10.2.1 Plasma Etch Endpoint Detection System Core Raw Materials
10.2.2 Main Manufacturers of Plasma Etch Endpoint Detection System Core Raw

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Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Plasma Etch Endpoint Detection System Production Mode
10.6 Plasma Etch Endpoint Detection System Procurement Model
10.7 Plasma Etch Endpoint Detection System Industry Sales Model and Sales Channels
10.7.1 Plasma Etch Endpoint Detection System Sales Model
10.7.2 Plasma Etch Endpoint Detection System Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Plasma Etch Endpoint Detection System Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Plasma Etch Endpoint Detection System Production Value by Region (2021-2026) & (USD Million)
Table 3. World Plasma Etch Endpoint Detection System Production Value by Region (2027-2032) & (USD Million)
Table 4. World Plasma Etch Endpoint Detection System Production Value Market Share by Region (2021-2026)
Table 5. World Plasma Etch Endpoint Detection System Production Value Market Share by Region (2027-2032)
Table 6. World Plasma Etch Endpoint Detection System Production by Region (2021-2026) & (Units)
Table 7. World Plasma Etch Endpoint Detection System Production by Region (2027-2032) & (Units)
Table 8. World Plasma Etch Endpoint Detection System Production Market Share by Region (2021-2026)
Table 9. World Plasma Etch Endpoint Detection System Production Market Share by Region (2027-2032)
Table 10. World Plasma Etch Endpoint Detection System Average Price by Region (2021-2026) & (K US$/Unit)
Table 11. World Plasma Etch Endpoint Detection System Average Price by Region (2027-2032) & (K US$/Unit)
Table 12. Plasma Etch Endpoint Detection System Major Market Trends
Table 13. World Plasma Etch Endpoint Detection System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
Table 14. World Plasma Etch Endpoint Detection System Consumption by Region (2021-2026) & (Units)
Table 15. World Plasma Etch Endpoint Detection System Consumption Forecast by Region (2027-2032) & (Units)
Table 16. World Plasma Etch Endpoint Detection System Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Plasma Etch Endpoint Detection System Producers in 2025
Table 18. World Plasma Etch Endpoint Detection System Production by Manufacturer (2021-2026) & (Units)

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Table 19. Production Market Share of Key Plasma Etch Endpoint Detection System Producers in 2025
Table 20. World Plasma Etch Endpoint Detection System Average Price by Manufacturer (2021-2026) & (K US$/Unit)
Table 21. Global Plasma Etch Endpoint Detection System Company Evaluation Quadrant
Table 22. World Plasma Etch Endpoint Detection System Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Plasma Etch Endpoint Detection System Production Site of Key Manufacturer
Table 24. Plasma Etch Endpoint Detection System Market: Company Product Type Footprint
Table 25. Plasma Etch Endpoint Detection System Market: Company Product Application Footprint
Table 26. Plasma Etch Endpoint Detection System Competitive Factors
Table 27. Plasma Etch Endpoint Detection System New Entrant and Capacity Expansion Plans
Table 28. Plasma Etch Endpoint Detection System Mergers & Acquisitions Activity
Table 29. United States VS China Plasma Etch Endpoint Detection System Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Plasma Etch Endpoint Detection System Production Comparison, (2021 & 2025 & 2032) & (Units)
Table 31. United States VS China Plasma Etch Endpoint Detection System Consumption Comparison, (2021 & 2025 & 2032) & (Units)
Table 32. United States Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Plasma Etch Endpoint Detection System Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Plasma Etch Endpoint Detection System Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Plasma Etch Endpoint Detection System Production (2021-2026) & (Units)
Table 36. United States Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share (2021-2026)
Table 37. China Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Plasma Etch Endpoint Detection System Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Plasma Etch Endpoint Detection System

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Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Plasma Etch Endpoint Detection System Production, (2021-2026) & (Units)
Table 41. China Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share (2021-2026)
Table 42. Rest of World Based Plasma Etch Endpoint Detection System Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production, (2021-2026) & (Units)
Table 46. Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share (2021-2026)
Table 47. World Plasma Etch Endpoint Detection System Production Value by Detection Technology, (USD Million), 2021 & 2025 & 2032
Table 48. World Plasma Etch Endpoint Detection System Production by Detection Technology (2021-2026) & (Units)
Table 49. World Plasma Etch Endpoint Detection System Production by Detection Technology (2027-2032) & (Units)
Table 50. World Plasma Etch Endpoint Detection System Production Value by Detection Technology (2021-2026) & (USD Million)
Table 51. World Plasma Etch Endpoint Detection System Production Value by Detection Technology (2027-2032) & (USD Million)
Table 52. World Plasma Etch Endpoint Detection System Average Price by Detection Technology (2021-2026) & (K US$/Unit)
Table 53. World Plasma Etch Endpoint Detection System Average Price by Detection Technology (2027-2032) & (K US$/Unit)
Table 54. World Plasma Etch Endpoint Detection System Production Value by Etched Material, (USD Million), 2021 & 2025 & 2032
Table 55. World Plasma Etch Endpoint Detection System Production by Etched Material (2021-2026) & (Units)
Table 56. World Plasma Etch Endpoint Detection System Production by Etched Material (2027-2032) & (Units)
Table 57. World Plasma Etch Endpoint Detection System Production Value by Etched Material (2021-2026) & (USD Million)
Table 58. World Plasma Etch Endpoint Detection System Production Value by Etched Material (2027-2032) & (USD Million)

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Table 59. World Plasma Etch Endpoint Detection System Average Price by Etched Material (2021-2026) & (K US$/Unit)
Table 60. World Plasma Etch Endpoint Detection System Average Price by Etched Material (2027-2032) & (K US$/Unit)
Table 61. World Plasma Etch Endpoint Detection System Production Value by Chamber Configuration, (USD Million), 2021 & 2025 & 2032
Table 62. World Plasma Etch Endpoint Detection System Production by Chamber Configuration (2021-2026) & (Units)
Table 63. World Plasma Etch Endpoint Detection System Production by Chamber Configuration (2027-2032) & (Units)
Table 64. World Plasma Etch Endpoint Detection System Production Value by Chamber Configuration (2021-2026) & (USD Million)
Table 65. World Plasma Etch Endpoint Detection System Production Value by Chamber Configuration (2027-2032) & (USD Million)
Table 66. World Plasma Etch Endpoint Detection System Average Price by Chamber Configuration (2021-2026) & (K US$/Unit)
Table 67. World Plasma Etch Endpoint Detection System Average Price by Chamber Configuration (2027-2032) & (K US$/Unit)
Table 68. World Plasma Etch Endpoint Detection System Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Plasma Etch Endpoint Detection System Production by Application (2021-2026) & (Units)
Table 70. World Plasma Etch Endpoint Detection System Production by Application (2027-2032) & (Units)
Table 71. World Plasma Etch Endpoint Detection System Production Value by Application (2021-2026) & (USD Million)
Table 72. World Plasma Etch Endpoint Detection System Production Value by Application (2027-2032) & (USD Million)
Table 73. World Plasma Etch Endpoint Detection System Average Price by Application (2021-2026) & (K US$/Unit)
Table 74. World Plasma Etch Endpoint Detection System Average Price by Application (2027-2032) & (K US$/Unit)
Table 75. HORIBA, Ltd. Basic Information, Manufacturing Base and Competitors
Table 76. HORIBA, Ltd. Major Business
Table 77. HORIBA, Ltd. Plasma Etch Endpoint Detection System Product and Services
Table 78. HORIBA, Ltd. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. HORIBA, Ltd. Recent Developments/Updates

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Table 80. HORIBA, Ltd. Competitive Strengths & Weaknesses
Table 81. Verity Instruments, Inc. Basic Information, Manufacturing Base and Competitors
Table 82. Verity Instruments, Inc. Major Business
Table 83. Verity Instruments, Inc. Plasma Etch Endpoint Detection System Product and Services
Table 84. Verity Instruments, Inc. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Verity Instruments, Inc. Recent Developments/Updates
Table 86. Verity Instruments, Inc. Competitive Strengths & Weaknesses
Table 87. INFICON Holding AG Basic Information, Manufacturing Base and Competitors
Table 88. INFICON Holding AG Major Business
Table 89. INFICON Holding AG Plasma Etch Endpoint Detection System Product and Services
Table 90. INFICON Holding AG Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. INFICON Holding AG Recent Developments/Updates
Table 92. INFICON Holding AG Competitive Strengths & Weaknesses
Table 93. MKS Inc. Basic Information, Manufacturing Base and Competitors
Table 94. MKS Inc. Major Business
Table 95. MKS Inc. Plasma Etch Endpoint Detection System Product and Services
Table 96. MKS Inc. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. MKS Inc. Recent Developments/Updates
Table 98. MKS Inc. Competitive Strengths & Weaknesses
Table 99. Hamamatsu Photonics K.K. Basic Information, Manufacturing Base and Competitors
Table 100. Hamamatsu Photonics K.K. Major Business
Table 101. Hamamatsu Photonics K.K. Plasma Etch Endpoint Detection System Product and Services
Table 102. Hamamatsu Photonics K.K. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Hamamatsu Photonics K.K. Recent Developments/Updates
Table 104. Hamamatsu Photonics K.K. Competitive Strengths & Weaknesses

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Table 105. PLASUS GmbH Basic Information, Manufacturing Base and Competitors
Table 106. PLASUS GmbH Major Business
Table 107. PLASUS GmbH Plasma Etch Endpoint Detection System Product and Services
Table 108. PLASUS GmbH Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. PLASUS GmbH Recent Developments/Updates
Table 110. PLASUS GmbH Competitive Strengths & Weaknesses
Table 111. LayTec AG Basic Information, Manufacturing Base and Competitors
Table 112. LayTec AG Major Business
Table 113. LayTec AG Plasma Etch Endpoint Detection System Product and Services
Table 114. LayTec AG Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. LayTec AG Recent Developments/Updates
Table 116. LayTec AG Competitive Strengths & Weaknesses
Table 117. SENTECH Instruments GmbH Basic Information, Manufacturing Base and Competitors
Table 118. SENTECH Instruments GmbH Major Business
Table 119. SENTECH Instruments GmbH Plasma Etch Endpoint Detection System Product and Services
Table 120. SENTECH Instruments GmbH Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. SENTECH Instruments GmbH Recent Developments/Updates
Table 122. SENTECH Instruments GmbH Competitive Strengths & Weaknesses
Table 123. Intellemetrics Global Ltd Basic Information, Manufacturing Base and Competitors
Table 124. Intellemetrics Global Ltd Major Business
Table 125. Intellemetrics Global Ltd Plasma Etch Endpoint Detection System Product and Services
Table 126. Intellemetrics Global Ltd Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Intellemetrics Global Ltd Recent Developments/Updates
Table 128. Intellemetrics Global Ltd Competitive Strengths & Weaknesses
Table 129. Impedans Ltd. Basic Information, Manufacturing Base and Competitors
Table 130. Impedans Ltd. Major Business

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Table 131. Impedans Ltd. Plasma Etch Endpoint Detection System Product and Services
Table 132. Impedans Ltd. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Impedans Ltd. Recent Developments/Updates
Table 134. Impedans Ltd. Competitive Strengths & Weaknesses
Table 135. Atonarp Inc. Basic Information, Manufacturing Base and Competitors
Table 136. Atonarp Inc. Major Business
Table 137. Atonarp Inc. Plasma Etch Endpoint Detection System Product and Services
Table 138. Atonarp Inc. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Atonarp Inc. Recent Developments/Updates
Table 140. Atonarp Inc. Competitive Strengths & Weaknesses
Table 141. Shanghai CheYiTian Technology Ltd. Basic Information, Manufacturing Base and Competitors
Table 142. Shanghai CheYiTian Technology Ltd. Major Business
Table 143. Shanghai CheYiTian Technology Ltd. Plasma Etch Endpoint Detection System Product and Services
Table 144. Shanghai CheYiTian Technology Ltd. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Shanghai CheYiTian Technology Ltd. Recent Developments/Updates
Table 146. Shanghai CheYiTian Technology Ltd. Competitive Strengths & Weaknesses
Table 147. Shanghai Ideaoptics Instruments Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 148. Shanghai Ideaoptics Instruments Co., Ltd. Major Business
Table 149. Shanghai Ideaoptics Instruments Co., Ltd. Plasma Etch Endpoint Detection System Product and Services
Table 150. Shanghai Ideaoptics Instruments Co., Ltd. Plasma Etch Endpoint Detection System Production (Units), Price (K US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Shanghai Ideaoptics Instruments Co., Ltd. Recent Developments/Updates
Table 152. Shanghai Ideaoptics Instruments Co., Ltd. Competitive Strengths & Weaknesses
Table 153. Global Key Players of Plasma Etch Endpoint Detection System Upstream (Raw Materials)
Table 154. Global Plasma Etch Endpoint Detection System Typical Customers

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Table 155. Plasma Etch Endpoint Detection System Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Plasma Etch Endpoint Detection System Picture
Figure 2. World Plasma Etch Endpoint Detection System Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Plasma Etch Endpoint Detection System Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Plasma Etch Endpoint Detection System Production (2021-2032) & (Units)
Figure 5. World Plasma Etch Endpoint Detection System Average Price (2021-2032) & (K US$/Unit)
Figure 6. World Plasma Etch Endpoint Detection System Production Value Market Share by Region (2021-2032)
Figure 7. World Plasma Etch Endpoint Detection System Production Market Share by Region (2021-2032)
Figure 8. North America Plasma Etch Endpoint Detection System Production (2021-2032) & (Units)
Figure 9. Europe Plasma Etch Endpoint Detection System Production (2021-2032) & (Units)
Figure 10. China Plasma Etch Endpoint Detection System Production (2021-2032) & (Units)
Figure 11. Japan Plasma Etch Endpoint Detection System Production (2021-2032) & (Units)
Figure 12. Plasma Etch Endpoint Detection System Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 15. World Plasma Etch Endpoint Detection System Consumption Market Share by Region (2021-2032)
Figure 16. United States Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 17. China Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 18. Europe Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 19. Japan Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)

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Figure 20. South Korea Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 21. ASEAN Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 22. India Plasma Etch Endpoint Detection System Consumption (2021-2032) & (Units)
Figure 23. Producer Shipments of Plasma Etch Endpoint Detection System by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Plasma Etch Endpoint Detection System Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Plasma Etch Endpoint Detection System Markets in 2025
Figure 26. United States VS China: Plasma Etch Endpoint Detection System Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Plasma Etch Endpoint Detection System Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Plasma Etch Endpoint Detection System Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share 2025
Figure 30. China Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Plasma Etch Endpoint Detection System Production Market Share 2025
Figure 32. World Plasma Etch Endpoint Detection System Production Value by Detection Technology, (USD Million), 2021 & 2025 & 2032
Figure 33. World Plasma Etch Endpoint Detection System Production Value Market Share by Detection Technology in 2025
Figure 34. Optical Emission Spectroscopy (OES)
Figure 35. Interferometric and Reflectometric Optical Detection
Figure 36. RF Electrical Sensing
Figure 37. Gas Analysis and Mass Spectrometry
Figure 38. Hybrid and Multi-sensor Detection
Figure 39. Others
Figure 40. World Plasma Etch Endpoint Detection System Production Market Share by Detection Technology (2021-2032)
Figure 41. World Plasma Etch Endpoint Detection System Production Value Market Share by Detection Technology (2021-2032)
Figure 42. World Plasma Etch Endpoint Detection System Average Price by Detection

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Technology (2021-2032) & (K US$/Unit)
Figure 43. World Plasma Etch Endpoint Detection System Production Value by Etched Material, (USD Million), 2021 & 2025 & 2032
Figure 44. World Plasma Etch Endpoint Detection System Production Value Market Share by Etched Material in 2025
Figure 45. Silicon and Silicon-based Semiconductor Materials
Figure 46. Dielectric Materials
Figure 47. Metals and Conductive Materials
Figure 48. Compound Semiconductor Materials
Figure 49. Photoresist and Organic Materials
Figure 50. Others
Figure 51. World Plasma Etch Endpoint Detection System Production Market Share by Etched Material (2021-2032)
Figure 52. World Plasma Etch Endpoint Detection System Production Value Market Share by Etched Material (2021-2032)
Figure 53. World Plasma Etch Endpoint Detection System Average Price by Etched Material (2021-2032) & (K US$/Unit)
Figure 54. World Plasma Etch Endpoint Detection System Production Value by Chamber Configuration, (USD Million), 2021 & 2025 & 2032
Figure 55. World Plasma Etch Endpoint Detection System Production Value Market Share by Chamber Configuration in 2025
Figure 56. Single-chamber Systems
Figure 57. Multi-chamber and Cluster-tool Systems
Figure 58. Others
Figure 59. World Plasma Etch Endpoint Detection System Production Market Share by Chamber Configuration (2021-2032)
Figure 60. World Plasma Etch Endpoint Detection System Production Value Market Share by Chamber Configuration (2021-2032)
Figure 61. World Plasma Etch Endpoint Detection System Average Price by Chamber Configuration (2021-2032) & (K US$/Unit)
Figure 62. World Plasma Etch Endpoint Detection System Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 63. World Plasma Etch Endpoint Detection System Production Value Market Share by Application in 2025
Figure 64. Logic ICs
Figure 65. Memory ICs
Figure 66. Power and Compound Semiconductor Devices
Figure 67. MEMS and Sensors
Figure 68. Photomask and Specialty Microfabrication

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Figure 69. Others
Figure 70. World Plasma Etch Endpoint Detection System Production Market Share by Application (2021-2032)
Figure 71. World Plasma Etch Endpoint Detection System Production Value Market Share by Application (2021-2032)
Figure 72. World Plasma Etch Endpoint Detection System Average Price by Application (2021-2032) & (K US$/Unit)
Figure 73. Plasma Etch Endpoint Detection System Industry Chain
Figure 74. Plasma Etch Endpoint Detection System Procurement Model
Figure 75. Plasma Etch Endpoint Detection System Sales Model
Figure 76. Plasma Etch Endpoint Detection System Sales Channels, Direct Sales, and Distribution
Figure 77. Methodology
Figure 78. Research Process and Data Source

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