

Global PVD Equipment for Solar Cell Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PVD Equipment for Solar Cell market size is expected to reach \$ 2203 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

PVD equipment for solar cells is a category of vacuum process equipment designed for thin-film deposition in photovoltaic cell manufacturing. Its core function is to form transparent conductive films, metal electrode films, seed layers, buffer layers, hole transport layers, electron transport layers, absorber layers, or barrier layers on silicon wafers, glass substrates, flexible films, or R&D samples through physical vapor deposition methods such as magnetron sputtering, vacuum evaporation, reactive sputtering, and plasma-assisted deposition. Such equipment typically consists of vacuum chambers, target cathodes, evaporation sources, carriers or roll-to-roll transport mechanisms, load-lock chambers, vacuum pump sets, process gas control, RF or DC power supplies, heating and cooling units, inline inspection, and automation control systems. It mainly addresses film uniformity, low-damage deposition, low breakage, high target utilization, high-throughput continuous production, and multilayer film integration. Typical applications include TCO deposition for HJT cells, metal seed-layer deposition for TOPCon or IBC cells, functional film deposition for perovskite and perovskite tandem cells, back-electrode and absorber-layer deposition for CIGS thin-film cells, and roll-to-roll coating for flexible photovoltaics. Major customers include photovoltaic cell manufacturers, thin-film solar companies, perovskite pilot lines, turnkey production-line suppliers, and new-energy materials research institutions.

The industrial value of PVD equipment for solar cells is evolving from standalone thin-film deposition tools into a critical process platform for high-efficiency cell technology upgrades. HJT cells require high-quality transparent conductive films on both sides of

silicon wafers, perovskite and tandem cells require multilayer functional films on glass, flexible substrates, or silicon bottom cells, and CIGS thin-film routes rely on stable deposition of metal back electrodes, buffer layers, and absorber layers. As a result, PVD equipment directly affects film thickness, uniformity, electrical properties, breakage rate, target utilization, tact time, equipment availability, and manufacturing cost per watt. As photovoltaic manufacturing moves from PERC and TOPCon toward HJT, BC, perovskite tandem, and other higher-efficiency routes, the research scope should not be limited to conventional sputtering tools, but should cover inline continuous systems, cluster multi-chamber platforms, large-area vertical systems, roll-to-roll coaters, and hybrid deposition platforms, with emphasis on layer function, capacity class, and process compatibility in advanced photovoltaic cell structures.

The competitive landscape is becoming multi-regional, multi-route, and multi-tiered. European suppliers have deep capabilities in large-area vacuum coating, HJT transparent conductive films, and thin-film solar equipment, making them suitable for high-end mass-production lines and complex turnkey projects. Japanese, Korean, and U.S. suppliers often extend from semiconductor, display, optical coating, and vacuum-system backgrounds into photovoltaic R&D, pilot-scale, and flexible thin-film applications. Chinese suppliers are being accelerated by domestic cell capacity expansion, HJT pilot lines, perovskite demonstration lines, and demand for localized turnkey solutions, enabling rapid iteration in large-size PVD equipment, production tact time, automation integration, and cost control. The barrier to competition is not a single mechanical structure, but a combined capability across vacuum system design, cathode and target engineering, low-damage plasma control, inline transfer, film-process databases, line-level tact matching, and customer-site commissioning. Equipment suppliers will need both process development capability and mass-production delivery capability to maintain share through technology transitions.

From a demand outlook perspective, PVD equipment for solar cells has strong structural growth potential. The global photovoltaic industry continues to pursue higher conversion efficiency, lower silver consumption, lower indium consumption, lower-carbon manufacturing, and higher production-line automation, while PVD equipment directly links material innovation with cell-architecture upgrades. HJT technology creates scaled demand for TCO deposition, TOPCon and BC routes may drive optimization of electrode seed layers and metallization processes, and perovskite and tandem routes create demand for multilayer functional films, low-temperature deposition, large-area uniformity, and flexible-substrate compatibility. In the short term, the market will still be affected by downstream capacity cycles and the pace of new-technology commercialization. In the medium to long term, however, equipment

demand is expected to shift from standalone tool purchases toward process packages, turnkey integration, upgrades, retrofits, and after-sales services. Production will remain concentrated in countries with strong vacuum-equipment supply chains and photovoltaic customer bases, while consumption will expand with new cell capacity and localization policies across Asia, Europe, North America, and emerging photovoltaic manufacturing bases.

This report studies the global PVD Equipment for Solar Cell production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PVD Equipment for Solar Cell 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 PVD Equipment for Solar Cell that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PVD Equipment for Solar Cell total production and demand, 2021-2032, (Units)

Global PVD Equipment for Solar Cell total production value, 2021-2032, (USD Million)

Global PVD Equipment for Solar Cell production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global PVD Equipment for Solar Cell consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: PVD Equipment for Solar Cell domestic production, consumption, key domestic manufacturers and share

Global PVD Equipment for Solar Cell production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global PVD Equipment for Solar Cell production by Technology Route, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global PVD Equipment for Solar Cell production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global PVD Equipment for Solar Cell 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 Advanced Technologies Co., Ltd., Applied Materials, Inc., Areesys Systems Inc., INDEOtec SA, Infovion Co., Ltd., Intevac, Inc., Kenosistec S.r.l., NAURA Technology Group Co., Ltd., Optorun Co., Ltd., SINGULUS TECHNOLOGIES AG, 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 PVD Equipment for Solar Cell 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 Technology Route, 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 PVD Equipment for Solar Cell Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PVD Equipment for Solar Cell Market, Segmentation by Technology Route:

HJT

Perovskite

Perovskite Tandem

Other

Global PVD Equipment for Solar Cell Market, Segmentation by Substrate Form:

Crystalline Silicon Wafer

Large-Area Glass Substrate

Flexible Roll

Other

Global PVD Equipment for Solar Cell Market, Segmentation by Automation Level:

Manual

Semi-Automatic

Fully Automatic

Global PVD Equipment for Solar Cell Market, Segmentation by Application:

TCO Deposition for HJT Cells

Functional Film Deposition for Perovskite Cells

Interfacial Film Deposition for Perovskite Tandem Cells

Other

Companies Profiled:

Advanced Technologies Co., Ltd.

Applied Materials, Inc.

Areesys Systems Inc.

INDEOtec SA

Infovion Co., Ltd.

Intevac, Inc.

Kenosistec S.r.l.

NAURA Technology Group Co., Ltd.

Optorun Co., Ltd.

SINGULUS TECHNOLOGIES AG

VON ARDENNE GmbH

Suzhou Maxwell Technologies Co., Ltd.

Shenzhen S.C New Energy Technology Corporation

Suzhou SC Intelligent Equipment Co., Ltd.

Guangdong Huicheng Vacuum Technology Co., Ltd.

KOREA KIYON Co., Ltd.

ULVAC, Inc.

Semicore Equipment, Inc.

Key Questions Answered:

1. How big is the global PVD Equipment for Solar Cell market?

2. What is the demand of the global PVD Equipment for Solar Cell market?
3. What is the year over year growth of the global PVD Equipment for Solar Cell market?
4. What is the production and production value of the global PVD Equipment for Solar Cell market?
5. Who are the key producers in the global PVD Equipment for Solar Cell market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World PVD Equipment for Solar Cell Demand (2021-2032)
- 2.2 World PVD Equipment for Solar Cell Consumption by Region
 - 2.2.1 World PVD Equipment for Solar Cell Consumption by Region (2021-2026)
 - 2.2.2 World PVD Equipment for Solar Cell Consumption Forecast by Region (2027-2032)
- 2.3 United States PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.4 China PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.5 Europe PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.6 Japan PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.7 South Korea PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.8 ASEAN PVD Equipment for Solar Cell Consumption (2021-2032)
- 2.9 India PVD Equipment for Solar Cell Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World PVD Equipment for Solar Cell Production Value by Manufacturer (2021-2026)
- 3.2 World PVD Equipment for Solar Cell Production by Manufacturer (2021-2026)
- 3.3 World PVD Equipment for Solar Cell Average Price by Manufacturer (2021-2026)
- 3.4 PVD Equipment for Solar Cell Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global PVD Equipment for Solar Cell Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for PVD Equipment for Solar Cell in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for PVD Equipment for Solar Cell in 2025
- 3.6 PVD Equipment for Solar Cell Market: Overall Company Footprint Analysis
 - 3.6.1 PVD Equipment for Solar Cell Market: Region Footprint
 - 3.6.2 PVD Equipment for Solar Cell Market: Company Product Type Footprint
 - 3.6.3 PVD Equipment for Solar Cell 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: PVD Equipment for Solar Cell Production Value Comparison
 - 4.1.1 United States VS China: PVD Equipment for Solar Cell Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: PVD Equipment for Solar Cell Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: PVD Equipment for Solar Cell Production Comparison
 - 4.2.1 United States VS China: PVD Equipment for Solar Cell Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: PVD Equipment for Solar Cell Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: PVD Equipment for Solar Cell Consumption Comparison
 - 4.3.1 United States VS China: PVD Equipment for Solar Cell Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: PVD Equipment for Solar Cell Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based PVD Equipment for Solar Cell Manufacturers and Market Share, 2021-2026

4.4.1 United States Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers PVD Equipment for Solar Cell Production Value (2021-2026)

4.4.3 United States Based Manufacturers PVD Equipment for Solar Cell Production (2021-2026)

4.5 China Based PVD Equipment for Solar Cell Manufacturers and Market Share

4.5.1 China Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers PVD Equipment for Solar Cell Production Value (2021-2026)

4.5.3 China Based Manufacturers PVD Equipment for Solar Cell Production (2021-2026)

4.6 Rest of World Based PVD Equipment for Solar Cell Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers PVD Equipment for Solar Cell Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers PVD Equipment for Solar Cell Production (2021-2026)

5 MARKET ANALYSIS BY TECHNOLOGY ROUTE

5.1 World PVD Equipment for Solar Cell Market Size Overview by Technology Route: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Technology Route

5.2.1 HJT

5.2.2 Perovskite

5.2.3 Perovskite Tandem

5.2.4 Other

5.3 Market Segment by Technology Route

5.3.1 World PVD Equipment for Solar Cell Production by Technology Route (2021-2032)

5.3.2 World PVD Equipment for Solar Cell Production Value by Technology Route (2021-2032)

5.3.3 World PVD Equipment for Solar Cell Average Price by Technology Route

(2021-2032)

6 MARKET ANALYSIS BY SUBSTRATE FORM

6.1 World PVD Equipment for Solar Cell Market Size Overview by Substrate Form:
2021 VS 2025 VS 2032

6.2 Segment Introduction by Substrate Form

6.2.1 Crystalline Silicon Wafer

6.2.2 Large-Area Glass Substrate

6.2.3 Flexible Roll

6.2.4 Other

6.3 Market Segment by Substrate Form

6.3.1 World PVD Equipment for Solar Cell Production by Substrate Form (2021-2032)

6.3.2 World PVD Equipment for Solar Cell Production Value by Substrate Form
(2021-2032)

6.3.3 World PVD Equipment for Solar Cell Average Price by Substrate Form
(2021-2032)

7 MARKET ANALYSIS BY AUTOMATION LEVEL

7.1 World PVD Equipment for Solar Cell Market Size Overview by Automation Level:
2021 VS 2025 VS 2032

7.2 Segment Introduction by Automation Level

7.2.1 Manual

7.2.2 Semi-Automatic

7.2.3 Fully Automatic

7.3 Market Segment by Automation Level

7.3.1 World PVD Equipment for Solar Cell Production by Automation Level
(2021-2032)

7.3.2 World PVD Equipment for Solar Cell Production Value by Automation Level
(2021-2032)

7.3.3 World PVD Equipment for Solar Cell Average Price by Automation Level
(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World PVD Equipment for Solar Cell Market Size Overview by Application: 2021 VS
2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 TCO Deposition for HJT Cells

8.2.2 Functional Film Deposition for Perovskite Cells

8.2.3 Interfacial Film Deposition for Perovskite Tandem Cells

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World PVD Equipment for Solar Cell Production by Application (2021-2032)

8.3.2 World PVD Equipment for Solar Cell Production Value by Application
(2021-2032)

8.3.3 World PVD Equipment for Solar Cell Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Advanced Technologies Co., Ltd.

9.1.1 Advanced Technologies Co., Ltd. Details

9.1.2 Advanced Technologies Co., Ltd. Major Business

9.1.3 Advanced Technologies Co., Ltd. PVD Equipment for Solar Cell Product and
Services

9.1.4 Advanced Technologies Co., Ltd. PVD Equipment for Solar Cell Production,
Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Advanced Technologies Co., Ltd. Recent Developments/Updates

9.1.6 Advanced Technologies Co., Ltd. Competitive Strengths & Weaknesses

9.2 Applied Materials, Inc.

9.2.1 Applied Materials, Inc. Details

9.2.2 Applied Materials, Inc. Major Business

9.2.3 Applied Materials, Inc. PVD Equipment for Solar Cell Product and Services

9.2.4 Applied Materials, Inc. PVD Equipment for Solar Cell Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.2.5 Applied Materials, Inc. Recent Developments/Updates

9.2.6 Applied Materials, Inc. Competitive Strengths & Weaknesses

9.3 Areesys Systems Inc.

9.3.1 Areesys Systems Inc. Details

9.3.2 Areesys Systems Inc. Major Business

9.3.3 Areesys Systems Inc. PVD Equipment for Solar Cell Product and Services

9.3.4 Areesys Systems Inc. PVD Equipment for Solar Cell Production, Price, Value,
Gross Margin and Market Share (2021-2026)

9.3.5 Areesys Systems Inc. Recent Developments/Updates

9.3.6 Areesys Systems Inc. Competitive Strengths & Weaknesses

9.4 INDEOtec SA

9.4.1 INDEOtec SA Details

- 9.4.2 INDEOtec SA Major Business
- 9.4.3 INDEOtec SA PVD Equipment for Solar Cell Product and Services
- 9.4.4 INDEOtec SA PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.4.5 INDEOtec SA Recent Developments/Updates
- 9.4.6 INDEOtec SA Competitive Strengths & Weaknesses
- 9.5 Infovion Co., Ltd.
 - 9.5.1 Infovion Co., Ltd. Details
 - 9.5.2 Infovion Co., Ltd. Major Business
 - 9.5.3 Infovion Co., Ltd. PVD Equipment for Solar Cell Product and Services
 - 9.5.4 Infovion Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Infovion Co., Ltd. Recent Developments/Updates
 - 9.5.6 Infovion Co., Ltd. Competitive Strengths & Weaknesses
- 9.6 Intevac, Inc.
 - 9.6.1 Intevac, Inc. Details
 - 9.6.2 Intevac, Inc. Major Business
 - 9.6.3 Intevac, Inc. PVD Equipment for Solar Cell Product and Services
 - 9.6.4 Intevac, Inc. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Intevac, Inc. Recent Developments/Updates
 - 9.6.6 Intevac, Inc. Competitive Strengths & Weaknesses
- 9.7 Kenosistec S.r.l.
 - 9.7.1 Kenosistec S.r.l. Details
 - 9.7.2 Kenosistec S.r.l. Major Business
 - 9.7.3 Kenosistec S.r.l. PVD Equipment for Solar Cell Product and Services
 - 9.7.4 Kenosistec S.r.l. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Kenosistec S.r.l. Recent Developments/Updates
 - 9.7.6 Kenosistec S.r.l. Competitive Strengths & Weaknesses
- 9.8 NAURA Technology Group Co., Ltd.
 - 9.8.1 NAURA Technology Group Co., Ltd. Details
 - 9.8.2 NAURA Technology Group Co., Ltd. Major Business
 - 9.8.3 NAURA Technology Group Co., Ltd. PVD Equipment for Solar Cell Product and Services
 - 9.8.4 NAURA Technology Group Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 NAURA Technology Group Co., Ltd. Recent Developments/Updates
 - 9.8.6 NAURA Technology Group Co., Ltd. Competitive Strengths & Weaknesses

9.9 Oporun Co., Ltd.

9.9.1 Oporun Co., Ltd. Details

9.9.2 Oporun Co., Ltd. Major Business

9.9.3 Oporun Co., Ltd. PVD Equipment for Solar Cell Product and Services

9.9.4 Oporun Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Oporun Co., Ltd. Recent Developments/Updates

9.9.6 Oporun Co., Ltd. Competitive Strengths & Weaknesses

9.10 SINGULUS TECHNOLOGIES AG

9.10.1 SINGULUS TECHNOLOGIES AG Details

9.10.2 SINGULUS TECHNOLOGIES AG Major Business

9.10.3 SINGULUS TECHNOLOGIES AG PVD Equipment for Solar Cell Product and Services

9.10.4 SINGULUS TECHNOLOGIES AG PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 SINGULUS TECHNOLOGIES AG Recent Developments/Updates

9.10.6 SINGULUS TECHNOLOGIES AG Competitive Strengths & Weaknesses

9.11 VON ARDENNE GmbH

9.11.1 VON ARDENNE GmbH Details

9.11.2 VON ARDENNE GmbH Major Business

9.11.3 VON ARDENNE GmbH PVD Equipment for Solar Cell Product and Services

9.11.4 VON ARDENNE GmbH PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 VON ARDENNE GmbH Recent Developments/Updates

9.11.6 VON ARDENNE GmbH Competitive Strengths & Weaknesses

9.12 Suzhou Maxwell Technologies Co., Ltd.

9.12.1 Suzhou Maxwell Technologies Co., Ltd. Details

9.12.2 Suzhou Maxwell Technologies Co., Ltd. Major Business

9.12.3 Suzhou Maxwell Technologies Co., Ltd. PVD Equipment for Solar Cell Product and Services

9.12.4 Suzhou Maxwell Technologies Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Suzhou Maxwell Technologies Co., Ltd. Recent Developments/Updates

9.12.6 Suzhou Maxwell Technologies Co., Ltd. Competitive Strengths & Weaknesses

9.13 Shenzhen S.C New Energy Technology Corporation

9.13.1 Shenzhen S.C New Energy Technology Corporation Details

9.13.2 Shenzhen S.C New Energy Technology Corporation Major Business

9.13.3 Shenzhen S.C New Energy Technology Corporation PVD Equipment for Solar Cell Product and Services

9.13.4 Shenzhen S.C New Energy Technology Corporation PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Shenzhen S.C New Energy Technology Corporation Recent Developments/Updates

9.13.6 Shenzhen S.C New Energy Technology Corporation Competitive Strengths & Weaknesses

9.14 Suzhou SC Intelligent Equipment Co., Ltd.

9.14.1 Suzhou SC Intelligent Equipment Co., Ltd. Details

9.14.2 Suzhou SC Intelligent Equipment Co., Ltd. Major Business

9.14.3 Suzhou SC Intelligent Equipment Co., Ltd. PVD Equipment for Solar Cell Product and Services

9.14.4 Suzhou SC Intelligent Equipment Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Suzhou SC Intelligent Equipment Co., Ltd. Recent Developments/Updates

9.14.6 Suzhou SC Intelligent Equipment Co., Ltd. Competitive Strengths & Weaknesses

9.15 Guangdong Huicheng Vacuum Technology Co., Ltd.

9.15.1 Guangdong Huicheng Vacuum Technology Co., Ltd. Details

9.15.2 Guangdong Huicheng Vacuum Technology Co., Ltd. Major Business

9.15.3 Guangdong Huicheng Vacuum Technology Co., Ltd. PVD Equipment for Solar Cell Product and Services

9.15.4 Guangdong Huicheng Vacuum Technology Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Guangdong Huicheng Vacuum Technology Co., Ltd. Recent Developments/Updates

9.15.6 Guangdong Huicheng Vacuum Technology Co., Ltd. Competitive Strengths & Weaknesses

9.16 KOREA KIYON Co., Ltd.

9.16.1 KOREA KIYON Co., Ltd. Details

9.16.2 KOREA KIYON Co., Ltd. Major Business

9.16.3 KOREA KIYON Co., Ltd. PVD Equipment for Solar Cell Product and Services

9.16.4 KOREA KIYON Co., Ltd. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 KOREA KIYON Co., Ltd. Recent Developments/Updates

9.16.6 KOREA KIYON Co., Ltd. Competitive Strengths & Weaknesses

9.17 ULVAC, Inc.

9.17.1 ULVAC, Inc. Details

9.17.2 ULVAC, Inc. Major Business

9.17.3 ULVAC, Inc. PVD Equipment for Solar Cell Product and Services

9.17.4 ULVAC, Inc. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 ULVAC, Inc. Recent Developments/Updates

9.17.6 ULVAC, Inc. Competitive Strengths & Weaknesses

9.18 Semicore Equipment, Inc.

9.18.1 Semicore Equipment, Inc. Details

9.18.2 Semicore Equipment, Inc. Major Business

9.18.3 Semicore Equipment, Inc. PVD Equipment for Solar Cell Product and Services

9.18.4 Semicore Equipment, Inc. PVD Equipment for Solar Cell Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Semicore Equipment, Inc. Recent Developments/Updates

9.18.6 Semicore Equipment, Inc. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 PVD Equipment for Solar Cell Industry Chain

10.2 PVD Equipment for Solar Cell Upstream Analysis

10.2.1 PVD Equipment for Solar Cell Core Raw Materials

10.2.2 Main Manufacturers of PVD Equipment for Solar Cell Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 PVD Equipment for Solar Cell Production Mode

10.6 PVD Equipment for Solar Cell Procurement Model

10.7 PVD Equipment for Solar Cell Industry Sales Model and Sales Channels

10.7.1 PVD Equipment for Solar Cell Sales Model

10.7.2 PVD Equipment for Solar Cell Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World PVD Equipment for Solar Cell Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World PVD Equipment for Solar Cell Production Value by Region (2021-2026) & (USD Million)

Table 3. World PVD Equipment for Solar Cell Production Value by Region (2027-2032) & (USD Million)

Table 4. World PVD Equipment for Solar Cell Production Value Market Share by Region (2021-2026)

Table 5. World PVD Equipment for Solar Cell Production Value Market Share by Region (2027-2032)

Table 6. World PVD Equipment for Solar Cell Production by Region (2021-2026) & (Units)

Table 7. World PVD Equipment for Solar Cell Production by Region (2027-2032) & (Units)

Table 8. World PVD Equipment for Solar Cell Production Market Share by Region (2021-2026)

Table 9. World PVD Equipment for Solar Cell Production Market Share by Region (2027-2032)

Table 10. World PVD Equipment for Solar Cell Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World PVD Equipment for Solar Cell Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. PVD Equipment for Solar Cell Major Market Trends

Table 13. World PVD Equipment for Solar Cell Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World PVD Equipment for Solar Cell Consumption by Region (2021-2026) & (Units)

Table 15. World PVD Equipment for Solar Cell Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World PVD Equipment for Solar Cell Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key PVD Equipment for Solar Cell Producers in 2025

Table 18. World PVD Equipment for Solar Cell Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key PVD Equipment for Solar Cell Producers in 2025

Table 20. World PVD Equipment for Solar Cell Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global PVD Equipment for Solar Cell Company Evaluation Quadrant

Table 22. World PVD Equipment for Solar Cell Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and PVD Equipment for Solar Cell Production Site of Key Manufacturer

Table 24. PVD Equipment for Solar Cell Market: Company Product Type Footprint

Table 25. PVD Equipment for Solar Cell Market: Company Product Application Footprint

Table 26. PVD Equipment for Solar Cell Competitive Factors

Table 27. PVD Equipment for Solar Cell New Entrant and Capacity Expansion Plans

Table 28. PVD Equipment for Solar Cell Mergers & Acquisitions Activity

Table 29. United States VS China PVD Equipment for Solar Cell Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China PVD Equipment for Solar Cell Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China PVD Equipment for Solar Cell Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers PVD Equipment for Solar Cell Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers PVD Equipment for Solar Cell Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers PVD Equipment for Solar Cell Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers PVD Equipment for Solar Cell Production Market Share (2021-2026)

Table 37. China Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers PVD Equipment for Solar Cell Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers PVD Equipment for Solar Cell Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers PVD Equipment for Solar Cell Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers PVD Equipment for Solar Cell Production Market

Share (2021-2026)

Table 42. Rest of World Based PVD Equipment for Solar Cell Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers PVD Equipment for Solar Cell Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers PVD Equipment for Solar Cell Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers PVD Equipment for Solar Cell Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers PVD Equipment for Solar Cell Production Market Share (2021-2026)

Table 47. World PVD Equipment for Solar Cell Production Value by Technology Route, (USD Million), 2021 & 2025 & 2032

Table 48. World PVD Equipment for Solar Cell Production by Technology Route (2021-2026) & (Units)

Table 49. World PVD Equipment for Solar Cell Production by Technology Route (2027-2032) & (Units)

Table 50. World PVD Equipment for Solar Cell Production Value by Technology Route (2021-2026) & (USD Million)

Table 51. World PVD Equipment for Solar Cell Production Value by Technology Route (2027-2032) & (USD Million)

Table 52. World PVD Equipment for Solar Cell Average Price by Technology Route (2021-2026) & (US\$/Unit)

Table 53. World PVD Equipment for Solar Cell Average Price by Technology Route (2027-2032) & (US\$/Unit)

Table 54. World PVD Equipment for Solar Cell Production Value by Substrate Form, (USD Million), 2021 & 2025 & 2032

Table 55. World PVD Equipment for Solar Cell Production by Substrate Form (2021-2026) & (Units)

Table 56. World PVD Equipment for Solar Cell Production by Substrate Form (2027-2032) & (Units)

Table 57. World PVD Equipment for Solar Cell Production Value by Substrate Form (2021-2026) & (USD Million)

Table 58. World PVD Equipment for Solar Cell Production Value by Substrate Form (2027-2032) & (USD Million)

Table 59. World PVD Equipment for Solar Cell Average Price by Substrate Form (2021-2026) & (US\$/Unit)

Table 60. World PVD Equipment for Solar Cell Average Price by Substrate Form (2027-2032) & (US\$/Unit)

Table 61. World PVD Equipment for Solar Cell Production Value by Automation Level, (USD Million), 2021 & 2025 & 2032

Table 62. World PVD Equipment for Solar Cell Production by Automation Level (2021-2026) & (Units)

Table 63. World PVD Equipment for Solar Cell Production by Automation Level (2027-2032) & (Units)

Table 64. World PVD Equipment for Solar Cell Production Value by Automation Level (2021-2026) & (USD Million)

Table 65. World PVD Equipment for Solar Cell Production Value by Automation Level (2027-2032) & (USD Million)

Table 66. World PVD Equipment for Solar Cell Average Price by Automation Level (2021-2026) & (US\$/Unit)

Table 67. World PVD Equipment for Solar Cell Average Price by Automation Level (2027-2032) & (US\$/Unit)

Table 68. World PVD Equipment for Solar Cell Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World PVD Equipment for Solar Cell Production by Application (2021-2026) & (Units)

Table 70. World PVD Equipment for Solar Cell Production by Application (2027-2032) & (Units)

Table 71. World PVD Equipment for Solar Cell Production Value by Application (2021-2026) & (USD Million)

Table 72. World PVD Equipment for Solar Cell Production Value by Application (2027-2032) & (USD Million)

Table 73. World PVD Equipment for Solar Cell Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World PVD Equipment for Solar Cell Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Advanced Technologies Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 76. Advanced Technologies Co., Ltd. Major Business

Table 77. Advanced Technologies Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 78. Advanced Technologies Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Advanced Technologies Co., Ltd. Recent Developments/Updates

Table 80. Advanced Technologies Co., Ltd. Competitive Strengths & Weaknesses

Table 81. Applied Materials, Inc. Basic Information, Manufacturing Base and

Competitors

Table 82. Applied Materials, Inc. Major Business

Table 83. Applied Materials, Inc. PVD Equipment for Solar Cell Product and Services

Table 84. Applied Materials, Inc. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Applied Materials, Inc. Recent Developments/Updates

Table 86. Applied Materials, Inc. Competitive Strengths & Weaknesses

Table 87. Areesys Systems Inc. Basic Information, Manufacturing Base and Competitors

Table 88. Areesys Systems Inc. Major Business

Table 89. Areesys Systems Inc. PVD Equipment for Solar Cell Product and Services

Table 90. Areesys Systems Inc. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Areesys Systems Inc. Recent Developments/Updates

Table 92. Areesys Systems Inc. Competitive Strengths & Weaknesses

Table 93. INDEOtec SA Basic Information, Manufacturing Base and Competitors

Table 94. INDEOtec SA Major Business

Table 95. INDEOtec SA PVD Equipment for Solar Cell Product and Services

Table 96. INDEOtec SA PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. INDEOtec SA Recent Developments/Updates

Table 98. INDEOtec SA Competitive Strengths & Weaknesses

Table 99. Infovion Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 100. Infovion Co., Ltd. Major Business

Table 101. Infovion Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 102. Infovion Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Infovion Co., Ltd. Recent Developments/Updates

Table 104. Infovion Co., Ltd. Competitive Strengths & Weaknesses

Table 105. Intevac, Inc. Basic Information, Manufacturing Base and Competitors

Table 106. Intevac, Inc. Major Business

Table 107. Intevac, Inc. PVD Equipment for Solar Cell Product and Services

Table 108. Intevac, Inc. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Intevac, Inc. Recent Developments/Updates
Table 110. Intevac, Inc. Competitive Strengths & Weaknesses
Table 111. Kenosistec S.r.l. Basic Information, Manufacturing Base and Competitors
Table 112. Kenosistec S.r.l. Major Business
Table 113. Kenosistec S.r.l. PVD Equipment for Solar Cell Product and Services
Table 114. Kenosistec S.r.l. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Kenosistec S.r.l. Recent Developments/Updates
Table 116. Kenosistec S.r.l. Competitive Strengths & Weaknesses
Table 117. NAURA Technology Group Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 118. NAURA Technology Group Co., Ltd. Major Business
Table 119. NAURA Technology Group Co., Ltd. PVD Equipment for Solar Cell Product and Services
Table 120. NAURA Technology Group Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. NAURA Technology Group Co., Ltd. Recent Developments/Updates
Table 122. NAURA Technology Group Co., Ltd. Competitive Strengths & Weaknesses
Table 123. Oporun Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 124. Oporun Co., Ltd. Major Business
Table 125. Oporun Co., Ltd. PVD Equipment for Solar Cell Product and Services
Table 126. Oporun Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Oporun Co., Ltd. Recent Developments/Updates
Table 128. Oporun Co., Ltd. Competitive Strengths & Weaknesses
Table 129. SINGULUS TECHNOLOGIES AG Basic Information, Manufacturing Base and Competitors
Table 130. SINGULUS TECHNOLOGIES AG Major Business
Table 131. SINGULUS TECHNOLOGIES AG PVD Equipment for Solar Cell Product and Services
Table 132. SINGULUS TECHNOLOGIES AG PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. SINGULUS TECHNOLOGIES AG Recent Developments/Updates
Table 134. SINGULUS TECHNOLOGIES AG Competitive Strengths & Weaknesses
Table 135. VON ARDENNE GmbH Basic Information, Manufacturing Base and

Competitors

Table 136. VON ARDENNE GmbH Major Business

Table 137. VON ARDENNE GmbH PVD Equipment for Solar Cell Product and Services

Table 138. VON ARDENNE GmbH PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. VON ARDENNE GmbH Recent Developments/Updates

Table 140. VON ARDENNE GmbH Competitive Strengths & Weaknesses

Table 141. Suzhou Maxwell Technologies Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Suzhou Maxwell Technologies Co., Ltd. Major Business

Table 143. Suzhou Maxwell Technologies Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 144. Suzhou Maxwell Technologies Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Suzhou Maxwell Technologies Co., Ltd. Recent Developments/Updates

Table 146. Suzhou Maxwell Technologies Co., Ltd. Competitive Strengths & Weaknesses

Table 147. Shenzhen S.C New Energy Technology Corporation Basic Information, Manufacturing Base and Competitors

Table 148. Shenzhen S.C New Energy Technology Corporation Major Business

Table 149. Shenzhen S.C New Energy Technology Corporation PVD Equipment for Solar Cell Product and Services

Table 150. Shenzhen S.C New Energy Technology Corporation PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Shenzhen S.C New Energy Technology Corporation Recent Developments/Updates

Table 152. Shenzhen S.C New Energy Technology Corporation Competitive Strengths & Weaknesses

Table 153. Suzhou SC Intelligent Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. Suzhou SC Intelligent Equipment Co., Ltd. Major Business

Table 155. Suzhou SC Intelligent Equipment Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 156. Suzhou SC Intelligent Equipment Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Suzhou SC Intelligent Equipment Co., Ltd. Recent Developments/Updates

Table 158. Suzhou SC Intelligent Equipment Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Guangdong Huicheng Vacuum Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. Guangdong Huicheng Vacuum Technology Co., Ltd. Major Business

Table 161. Guangdong Huicheng Vacuum Technology Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 162. Guangdong Huicheng Vacuum Technology Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Guangdong Huicheng Vacuum Technology Co., Ltd. Recent Developments/Updates

Table 164. Guangdong Huicheng Vacuum Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 165. KOREA KIYON Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 166. KOREA KIYON Co., Ltd. Major Business

Table 167. KOREA KIYON Co., Ltd. PVD Equipment for Solar Cell Product and Services

Table 168. KOREA KIYON Co., Ltd. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. KOREA KIYON Co., Ltd. Recent Developments/Updates

Table 170. KOREA KIYON Co., Ltd. Competitive Strengths & Weaknesses

Table 171. ULVAC, Inc. Basic Information, Manufacturing Base and Competitors

Table 172. ULVAC, Inc. Major Business

Table 173. ULVAC, Inc. PVD Equipment for Solar Cell Product and Services

Table 174. ULVAC, Inc. PVD Equipment for Solar Cell Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. ULVAC, Inc. Recent Developments/Updates

Table 176. ULVAC, Inc. Competitive Strengths & Weaknesses

Table 177. Semicore Equipment, Inc. Basic Information, Manufacturing Base and Competitors

Table 178. Semicore Equipment, Inc. Major Business

Table 179. Semicore Equipment, Inc. PVD Equipment for Solar Cell Product and Services

Table 180. Semicore Equipment, Inc. PVD Equipment for Solar Cell Production (Units),

Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share
(2021-2026)

Table 181. Semicore Equipment, Inc. Recent Developments/Updates

Table 182. Semicore Equipment, Inc. Competitive Strengths & Weaknesses

Table 183. Global Key Players of PVD Equipment for Solar Cell Upstream (Raw
Materials)

Table 184. Global PVD Equipment for Solar Cell Typical Customers

Table 185. PVD Equipment for Solar Cell Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. PVD Equipment for Solar Cell Picture

Figure 2. World PVD Equipment for Solar Cell Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World PVD Equipment for Solar Cell Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 5. World PVD Equipment for Solar Cell Average Price (2021-2032) & (US\$/Unit)

Figure 6. World PVD Equipment for Solar Cell Production Value Market Share by Region (2021-2032)

Figure 7. World PVD Equipment for Solar Cell Production Market Share by Region (2021-2032)

Figure 8. North America PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 9. Europe PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 10. China PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 11. Japan PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 12. South Korea PVD Equipment for Solar Cell Production (2021-2032) & (Units)

Figure 13. PVD Equipment for Solar Cell Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 16. World PVD Equipment for Solar Cell Consumption Market Share by Region (2021-2032)

Figure 17. United States PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 18. China PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 19. Europe PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 20. Japan PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 21. South Korea PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 22. ASEAN PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 23. India PVD Equipment for Solar Cell Consumption (2021-2032) & (Units)

Figure 24. Producer Shipments of PVD Equipment for Solar Cell by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for PVD Equipment for Solar Cell Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for PVD Equipment for Solar Cell Markets in 2025

Figure 27. United States VS China: PVD Equipment for Solar Cell Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: PVD Equipment for Solar Cell Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: PVD Equipment for Solar Cell Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers PVD Equipment for Solar Cell Production Market Share 2025

Figure 31. China Based Manufacturers PVD Equipment for Solar Cell Production Market Share 2025

Figure 32. Rest of World Based Manufacturers PVD Equipment for Solar Cell Production Market Share 2025

Figure 33. World PVD Equipment for Solar Cell Production Value by Technology Route, (USD Million), 2021 & 2025 & 2032

Figure 34. World PVD Equipment for Solar Cell Production Value Market Share by Technology Route in 2025

Figure 35. HJT

Figure 36. Perovskite

Figure 37. Perovskite Tandem

Figure 38. Other

Figure 39. World PVD Equipment for Solar Cell Production Market Share by Technology Route (2021-2032)

Figure 40. World PVD Equipment for Solar Cell Production Value Market Share by Technology Route (2021-2032)

Figure 41. World PVD Equipment for Solar Cell Average Price by Technology Route (2021-2032) & (US\$/Unit)

Figure 42. World PVD Equipment for Solar Cell Production Value by Substrate Form, (USD Million), 2021 & 2025 & 2032

Figure 43. World PVD Equipment for Solar Cell Production Value Market Share by Substrate Form in 2025

Figure 44. Crystalline Silicon Wafer

Figure 45. Large-Area Glass Substrate

Figure 46. Flexible Roll

Figure 47. Other

Figure 48. World PVD Equipment for Solar Cell Production Market Share by Substrate Form (2021-2032)

Figure 49. World PVD Equipment for Solar Cell Production Value Market Share by

Substrate Form (2021-2032)

Figure 50. World PVD Equipment for Solar Cell Average Price by Substrate Form (2021-2032) & (US\$/Unit)

Figure 51. World PVD Equipment for Solar Cell Production Value by Automation Level, (USD Million), 2021 & 2025 & 2032

Figure 52. World PVD Equipment for Solar Cell Production Value Market Share by Automation Level in 2025

Figure 53. Manual

Figure 54. Semi-Automatic

Figure 55. Fully Automatic

Figure 56. World PVD Equipment for Solar Cell Production Market Share by Automation Level (2021-2032)

Figure 57. World PVD Equipment for Solar Cell Production Value Market Share by Automation Level (2021-2032)

Figure 58. World PVD Equipment for Solar Cell Average Price by Automation Level (2021-2032) & (US\$/Unit)

Figure 59. World PVD Equipment for Solar Cell Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World PVD Equipment for Solar Cell Production Value Market Share by Application in 2025

Figure 61. TCO Deposition for HJT Cells

Figure 62. Functional Film Deposition for Perovskite Cells

Figure 63. Interfacial Film Deposition for Perovskite Tandem Cells

Figure 64. Other

Figure 65. World PVD Equipment for Solar Cell Production Market Share by Application (2021-2032)

Figure 66. World PVD Equipment for Solar Cell Production Value Market Share by Application (2021-2032)

Figure 67. World PVD Equipment for Solar Cell Average Price by Application (2021-2032) & (US\$/Unit)

Figure 68. PVD Equipment for Solar Cell Industry Chain

Figure 69. PVD Equipment for Solar Cell Procurement Model

Figure 70. PVD Equipment for Solar Cell Sales Model

Figure 71. PVD Equipment for Solar Cell Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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