

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Capacitance Diaphragm Gauge (CDG) market size is expected to reach \$ 128 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

In 2025, global Semiconductor Capacitance Diaphragm Gauge (CDG) sales reached approximately 77,506 Units, with an average global market price of around US\$ 1,053 per Unit.

A Semiconductor Capacitance Diaphragm Gauge (CDG) is a high-accuracy vacuum pressure sensor widely used in semiconductor manufacturing and other precision industrial applications. It measures pressure by detecting the deflection of a thin, corrosion-resistant diaphragm (typically made of ceramic or metal) through changes in capacitance between the diaphragm and a fixed electrode. As pressure varies, the diaphragm flexes, altering the capacitance, which is then converted into an electrical signal for precise pressure readings. CDGs offer excellent linearity, stability, and gas-independent performance across a broad pressure range (e.g., from milliTorr to atmospheric pressure). They are particularly valued in semiconductor processes like etching, CVD, and PVD due to their fast response, low power consumption, and resistance to harsh environments. Advanced models feature temperature control, digital communication interfaces (e.g., EtherCAT, PROFIBUS), and diagnostic capabilities for enhanced reliability in critical vacuum systems.

Semiconductor Capacitance Diaphragm Gauges (CDGs) are typically produced under an 'in-house core + tightly controlled critical steps + selective outsourcing of precision parts' model. Manufacturing is high-mix/low-volume and often configure-to-order, driven by range, fittings, heated vs. ambient designs, and corrosion-resistant variants. Leading suppliers keep the sensing-head core in-house: a high-stability metal diaphragm and capacitor electrode set, vacuum sealing and insulation structures, thermal-control hardware, analog front-end circuitry, and digital compensation/linearization. Final build

is completed in clean conditions with bake-out/outgassing, helium leak testing, burn-in screening, and multi-point full calibration, shipped with traceable calibration certificates. Outsourced content is commonly limited to housings and some precision-machined components, wiring harnesses, and standard connectors, while final calibration and consistency control remain internal to protect accuracy, stability, and IP. As an industry-practical range, gross margin is often ~40%?60% for mainstream production models; premium heated, ultra-low-drift, corrosion-/high-temperature designs, or bundled solutions (controllers/valves plus service) can reach ~55%?70%. Margin dispersion is mainly driven by material systems, cleanroom and calibration cost, yield/rework rates, and the share of aftermarket service. The upstream supply base includes 316L and high-Ni diaphragm alloys, ceramic or glass-to-metal seals, precision machining and surface finishing, electronics (op-amps, ADCs, MCUs, temperature devices), leak-test/vacuum consumables, and metrology standards plus calibration rigs. Midstream activities comprise sensing-head fabrication, clean assembly, thermal control and compensation, full calibration, and final test. Downstream demand comes from fabs and equipment OEMs, supporting chamber pressure control in etch, CVD/ALD, and PVD, as well as gas delivery and subfab vacuum systems, with a strong extension into recalibration, refurbishment, and spares (MRO).

Market Development Opportunities & Main Driving Factors

As advanced-node and advanced-packaging expansions run in parallel with productivity upgrades in existing fabs, capacitance diaphragm vacuum gauges (CDGs) ? the reference sensors in chamber pressure control loops ? benefit from both new-tool installations and recurring demand from spares replacement and periodic recalibration. Corporate filings highlight the semiconductor pull on vacuum metrology revenues: MKS disclosed that roughly 42% of its 2024 net revenues came from semiconductor markets, while INFICON's 2024 annual reporting stated that 'Semiconductor & Vacuum Coating' contributed more than half of Group sales. Government-driven fab build-outs under U.S. CHIPS incentives and EU Chips Act?related state-aid approvals are further extending the demand runway for tools and critical components.

Market Challenges, Risks, & Restraints

The real battleground is not 'whether it measures,' but whether it remains traceable and repeatable under contamination, corrosion, and thermal-drift stress. Materials, clean assembly discipline, full calibration, and field recalibration infrastructure form the barrier to entry ? and lengthen qualification cycles. When the cycle turns down, OEM order flow and spares cadence typically soften together. Sell-side commentary broadly warns that localization pushes can intensify price and delivery negotiations; combined with cross-region compliance and supply-chain disruptions, volatility can rise. Ultimately, yield, rework, and calibration capability become hard constraints on gross margin resilience.

Downstream Demand Trends

Demand is shifting from 'installation-led' to 'yield-and-uptime-led.' In critical steps such as etch and CVD/ALD, fabs increasingly value micro-drift control, digital connectivity, and remote diagnostics ? turning CDGs from standalone sensors into networked process-control nodes. As new fabs ramp across regions, standardized interfaces and fast recalibration become more important, lifting the revenue share of recalibration, refurbishment, and spares (MRO). Penetration of premium heated, corrosion-resistant, and higher-traceability-grade products is accelerating accordingly.

This report studies the global Semiconductor Capacitance Diaphragm Gauge (CDG) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Capacitance Diaphragm Gauge (CDG) 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 Semiconductor Capacitance Diaphragm Gauge (CDG) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Capacitance Diaphragm Gauge (CDG) total production and demand, 2021-2032, (Units)

Global Semiconductor Capacitance Diaphragm Gauge (CDG) total production value, 2021-2032, (USD Million)

Global Semiconductor Capacitance Diaphragm Gauge (CDG) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Semiconductor Capacitance Diaphragm Gauge (CDG) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Semiconductor Capacitance Diaphragm Gauge (CDG) domestic production, consumption, key domestic manufacturers and share

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

Global Semiconductor Capacitance Diaphragm Gauge (CDG) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Semiconductor Capacitance Diaphragm Gauge (CDG) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Semiconductor Capacitance Diaphragm Gauge (CDG) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include MKS Instruments, INFICON, Atlas Copco (Leybold and Edwards), Pfeiffer Vacuum+Fab

Solutions, Setra Systems, Canon Anelva, Brooks Instrument, ZHENTAI INSTRUMENT, ULVAC, Azbil, 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 Semiconductor Capacitance Diaphragm Gauge (CDG) market

Detailed Segmentation:

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

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, Segmentation by Type:

Unheated Type

Heated Type

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, Segmentation by Scale Range:

0.01-1 Torr

1-10 Torr

10-100 Torr

100-1000 Torr

More than 1000 Torr

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, Segmentation by Measurement Principle:

Absolute CDG

Differential CDG

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, Segmentation by Diaphragm Material:

Metal

Ceramic

Global Semiconductor Capacitance Diaphragm Gauge (CDG) Market, Segmentation by Application:

Deposition

Etching and Cleaning

Ion Implantation

Others

Companies Profiled:

MKS Instruments

INFICON

Atlas Copco (Leybold and Edwards)

Pfeiffer Vacuum+Fab Solutions

Setra Systems

Canon Anelva

Brooks Instrument

ZHENTAI INSTRUMENT

ULVAC

Azbil

Agilent

Kurt J. Lesker

EBARA

ASAIR

Atovac

SATO VAC

Key Questions Answered:

1. How big is the global Semiconductor Capacitance Diaphragm Gauge (CDG) market?
2. What is the demand of the global Semiconductor Capacitance Diaphragm Gauge (CDG) market?
3. What is the year over year growth of the global Semiconductor Capacitance Diaphragm Gauge (CDG) market?
4. What is the production and production value of the global Semiconductor Capacitance Diaphragm Gauge (CDG) market?
5. Who are the key producers in the global Semiconductor Capacitance Diaphragm Gauge (CDG) market?
6. What are the growth factors driving the market demand?

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