

Global 12 Inch PVD System Market Growth 2026-2032

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Abstracts

The global 12 Inch PVD System market size is predicted to grow from US\$ 3732 million in 2025 to US\$ 6081 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

In 2025, global production capacity for 12-inch PVD systems is approximately 1,250 units, with actual production reaching around 1,090 units. The average global market price is about US\$ 3.5 million per unit, and gross margins in this segment generally range from 38% to 48%. A 12-inch Physical Vapor Deposition (PVD) System is a semiconductor manufacturing tool designed to deposit metal and compound thin films on 300 mm silicon wafers through physical processes such as magnetron sputtering or evaporation. Compared with smaller wafer-size equipment, 12-inch PVD systems emphasize high throughput, excellent film uniformity, and tight process repeatability to meet the requirements of advanced semiconductor mass production. These systems are widely used in front-end-of-line (FEOL) and back-end-of-line (BEOL) processes, including barrier and liner layers, seed layers, interconnect metallization, and hard mask deposition. As the industry continues to migrate toward larger wafer sizes and higher integration levels, 12-inch PVD systems have become standard equipment in advanced logic, memory, and power semiconductor fabs.

The upstream of the 12-inch PVD system industry chain includes high-purity metal targets, process gases (argon, nitrogen, etc.), precision vacuum chambers, magnetron sputtering cathodes, RF/DC power supplies, wafer handling and transfer modules, advanced sensors, and process control software. The midstream focuses on equipment design and manufacturing, covering chamber architecture optimization, multi-cathode integration, film uniformity tuning across 300 mm wafers, system integration, and reliability and productivity testing, which represent the core technological and value-added segments. The downstream mainly serves advanced semiconductor fabs, including logic foundries, memory manufacturers, and IDMs. The industry chain further

extends to equipment installation, process qualification, productivity enhancement, preventive maintenance, spare parts supply, and long-term service agreements, with service revenue becoming an increasingly important component.

The 12-inch PVD system market is fundamentally driven by the continued expansion of advanced semiconductor manufacturing capacity. As leading-edge logic and memory production increasingly concentrates on 300 mm wafers, demand for high-throughput and highly stable PVD platforms remains strong. Compared with smaller wafer tools, 12-inch systems offer superior economies of scale, making them essential for cost control in advanced fabs.

Technological evolution further supports market growth. Advanced interconnect schemes, complex multilayer stacks, and tighter design rules place higher requirements on film uniformity, contamination control, and process repeatability, prompting continuous upgrades of 12-inch PVD platforms. Although capital expenditure cycles can introduce short-term volatility, long equipment lifecycles, high switching costs, and strong customer stickiness contribute to relatively stable margins. With ongoing investments in advanced logic, memory, and power semiconductor fabs worldwide, the 12-inch PVD system market is expected to maintain steady, above-average growth over the medium to long term.

LP Information, Inc. (LPI) ' newest research report, the '12 Inch PVD System Industry Forecast' looks at past sales and reviews total world 12 Inch PVD System sales in 2025, providing a comprehensive analysis by region and market sector of projected 12 Inch PVD System sales for 2026 through 2032. With 12 Inch PVD System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world 12 Inch PVD System industry.

This Insight Report provides a comprehensive analysis of the global 12 Inch PVD System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 12 Inch PVD System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 12 Inch PVD System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 12 Inch PVD System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of

opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 12 Inch PVD System.

This report presents a comprehensive overview, market shares, and growth opportunities of 12 Inch PVD System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single-chamber

Multi-chamber

Segmentation by Deposition Technology:

Magnetron Sputtering

Evaporation-based

Segmentation by Application:

Logic Device

Memory Device

Power Device

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Applied Materials

Lam Research

Tokyo Electron

ULVAC

Canon Anelva

Hitachi High-Tech

Kokusai Electric

Evatec

NAURA

Piotech

Key Questions Addressed in this Report

What is the 10-year outlook for the global 12 Inch PVD System market?

What factors are driving 12 Inch PVD System market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 12 Inch PVD System market opportunities vary by end market size?

How does 12 Inch PVD System break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global 12 Inch PVD System Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for 12 Inch PVD System by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for 12 Inch PVD System by Country/Region, 2021, 2025 & 2032
- 2.2 12 Inch PVD System Segment by Type
 - 2.2.1 Single-chamber
 - 2.2.2 Multi-chamber
 - 2.2.3 12 Inch PVD System Sales by Type
 - 2.2.3.1 Global 12 Inch PVD System Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global 12 Inch PVD System Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global 12 Inch PVD System Sale Price by Type (2021-2026)
- 2.3 12 Inch PVD System Segment by Deposition Technology
 - 2.3.1 Magnetron Sputtering
 - 2.3.2 Evaporation-based
 - 2.3.3 12 Inch PVD System Sales by Deposition Technology
 - 2.3.3.1 Global 12 Inch PVD System Sales Market Share by Deposition Technology (2021-2026)
 - 2.3.3.2 Global 12 Inch PVD System Revenue and Market Share by Deposition Technology (2021-2026)
 - 2.3.3.3 Global 12 Inch PVD System Sale Price by Deposition Technology (2021-2026)
- 2.4 12 Inch PVD System Segment by Application

- 2.4.1 Logic Device
- 2.4.2 Memory Device
- 2.4.3 Power Device
- 2.4.4 Others
- 2.4.5 12 Inch PVD System Sales by Application
 - 2.4.5.1 Global 12 Inch PVD System Sale Market Share by Application (2021-2026)
 - 2.4.5.2 Global 12 Inch PVD System Revenue and Market Share by Application (2021-2026)
 - 2.4.5.3 Global 12 Inch PVD System Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global 12 Inch PVD System Breakdown Data by Company
 - 3.1.1 Global 12 Inch PVD System Annual Sales by Company (2021-2026)
 - 3.1.2 Global 12 Inch PVD System Sales Market Share by Company (2021-2026)
- 3.2 Global 12 Inch PVD System Annual Revenue by Company (2021-2026)
 - 3.2.1 Global 12 Inch PVD System Revenue by Company (2021-2026)
 - 3.2.2 Global 12 Inch PVD System Revenue Market Share by Company (2021-2026)
- 3.3 Global 12 Inch PVD System Sale Price by Company
- 3.4 Key Manufacturers 12 Inch PVD System Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers 12 Inch PVD System Product Location Distribution
 - 3.4.2 Players 12 Inch PVD System Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR 12 INCH PVD SYSTEM BY GEOGRAPHIC REGION

- 4.1 World Historic 12 Inch PVD System Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global 12 Inch PVD System Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global 12 Inch PVD System Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic 12 Inch PVD System Market Size by Country/Region (2021-2026)
 - 4.2.1 Global 12 Inch PVD System Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global 12 Inch PVD System Annual Revenue by Country/Region (2021-2026)

- 4.3 Americas 12 Inch PVD System Sales Growth
- 4.4 APAC 12 Inch PVD System Sales Growth
- 4.5 Europe 12 Inch PVD System Sales Growth
- 4.6 Middle East & Africa 12 Inch PVD System Sales Growth

5 AMERICAS

- 5.1 Americas 12 Inch PVD System Sales by Country
 - 5.1.1 Americas 12 Inch PVD System Sales by Country (2021-2026)
 - 5.1.2 Americas 12 Inch PVD System Revenue by Country (2021-2026)
- 5.2 Americas 12 Inch PVD System Sales by Type (2021-2026)
- 5.3 Americas 12 Inch PVD System Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC 12 Inch PVD System Sales by Region
 - 6.1.1 APAC 12 Inch PVD System Sales by Region (2021-2026)
 - 6.1.2 APAC 12 Inch PVD System Revenue by Region (2021-2026)
- 6.2 APAC 12 Inch PVD System Sales by Type (2021-2026)
- 6.3 APAC 12 Inch PVD System Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe 12 Inch PVD System by Country
 - 7.1.1 Europe 12 Inch PVD System Sales by Country (2021-2026)
 - 7.1.2 Europe 12 Inch PVD System Revenue by Country (2021-2026)
- 7.2 Europe 12 Inch PVD System Sales by Type (2021-2026)
- 7.3 Europe 12 Inch PVD System Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa 12 Inch PVD System by Country

8.1.1 Middle East & Africa 12 Inch PVD System Sales by Country (2021-2026)

8.1.2 Middle East & Africa 12 Inch PVD System Revenue by Country (2021-2026)

8.2 Middle East & Africa 12 Inch PVD System Sales by Type (2021-2026)

8.3 Middle East & Africa 12 Inch PVD System Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of 12 Inch PVD System

10.3 Manufacturing Process Analysis of 12 Inch PVD System

10.4 Industry Chain Structure of 12 Inch PVD System

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 12 Inch PVD System Distributors

11.3 12 Inch PVD System Customer

12 WORLD FORECAST REVIEW FOR 12 INCH PVD SYSTEM BY GEOGRAPHIC REGION

12.1 Global 12 Inch PVD System Market Size Forecast by Region

12.1.1 Global 12 Inch PVD System Forecast by Region (2027-2032)

12.1.2 Global 12 Inch PVD System Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global 12 Inch PVD System Forecast by Type (2027-2032)

12.7 Global 12 Inch PVD System Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Applied Materials

13.1.1 Applied Materials Company Information

13.1.2 Applied Materials 12 Inch PVD System Product Portfolios and Specifications

13.1.3 Applied Materials 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Applied Materials Main Business Overview

13.1.5 Applied Materials Latest Developments

13.2 Lam Research

13.2.1 Lam Research Company Information

13.2.2 Lam Research 12 Inch PVD System Product Portfolios and Specifications

13.2.3 Lam Research 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Lam Research Main Business Overview

13.2.5 Lam Research Latest Developments

13.3 Tokyo Electron

13.3.1 Tokyo Electron Company Information

13.3.2 Tokyo Electron 12 Inch PVD System Product Portfolios and Specifications

13.3.3 Tokyo Electron 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Tokyo Electron Main Business Overview

13.3.5 Tokyo Electron Latest Developments

13.4 ULVAC

13.4.1 ULVAC Company Information

- 13.4.2 ULVAC 12 Inch PVD System Product Portfolios and Specifications
- 13.4.3 ULVAC 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.4.4 ULVAC Main Business Overview
- 13.4.5 ULVAC Latest Developments
- 13.5 Canon Anelva
 - 13.5.1 Canon Anelva Company Information
 - 13.5.2 Canon Anelva 12 Inch PVD System Product Portfolios and Specifications
 - 13.5.3 Canon Anelva 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Canon Anelva Main Business Overview
 - 13.5.5 Canon Anelva Latest Developments
- 13.6 Hitachi High-Tech
 - 13.6.1 Hitachi High-Tech Company Information
 - 13.6.2 Hitachi High-Tech 12 Inch PVD System Product Portfolios and Specifications
 - 13.6.3 Hitachi High-Tech 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Hitachi High-Tech Main Business Overview
 - 13.6.5 Hitachi High-Tech Latest Developments
- 13.7 Kokusai Electric
 - 13.7.1 Kokusai Electric Company Information
 - 13.7.2 Kokusai Electric 12 Inch PVD System Product Portfolios and Specifications
 - 13.7.3 Kokusai Electric 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Kokusai Electric Main Business Overview
 - 13.7.5 Kokusai Electric Latest Developments
- 13.8 Evatec
 - 13.8.1 Evatec Company Information
 - 13.8.2 Evatec 12 Inch PVD System Product Portfolios and Specifications
 - 13.8.3 Evatec 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Evatec Main Business Overview
 - 13.8.5 Evatec Latest Developments
- 13.9 NAURA
 - 13.9.1 NAURA Company Information
 - 13.9.2 NAURA 12 Inch PVD System Product Portfolios and Specifications
 - 13.9.3 NAURA 12 Inch PVD System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 NAURA Main Business Overview

13.9.5 NAURA Latest Developments

13.10 Piotech

13.10.1 Piotech Company Information

13.10.2 Piotech 12 Inch PVD System Product Portfolios and Specifications

13.10.3 Piotech 12 Inch PVD System Sales, Revenue, Price and Gross Margin
(2021-2026)

13.10.4 Piotech Main Business Overview

13.10.5 Piotech Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. 12 Inch PVD System Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. 12 Inch PVD System Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Single-chamber
- Table 4. Major Players of Multi-chamber
- Table 5. Global 12 Inch PVD System Sales by Type (2021-2026) & (Units)
- Table 6. Global 12 Inch PVD System Sales Market Share by Type (2021-2026)
- Table 7. Global 12 Inch PVD System Revenue by Type (2021-2026) & (\$ million)
- Table 8. Global 12 Inch PVD System Revenue Market Share by Type (2021-2026)
- Table 9. Global 12 Inch PVD System Sale Price by Type (2021-2026) & (K US\$/Unit)
- Table 10. Major Players of Magnetron Sputtering
- Table 11. Major Players of Evaporation-based
- Table 12. Global 12 Inch PVD System Sales by Deposition Technology (2021-2026) & (Units)
- Table 13. Global 12 Inch PVD System Sales Market Share by Deposition Technology (2021-2026)
- Table 14. Global 12 Inch PVD System Revenue by Deposition Technology (2021-2026) & (\$ million)
- Table 15. Global 12 Inch PVD System Revenue Market Share by Deposition Technology (2021-2026)
- Table 16. Global 12 Inch PVD System Sale Price by Deposition Technology (2021-2026) & (K US\$/Unit)
- Table 17. Global 12 Inch PVD System Sale by Application (2021-2026) & (Units)
- Table 18. Global 12 Inch PVD System Sale Market Share by Application (2021-2026)
- Table 19. Global 12 Inch PVD System Revenue by Application (2021-2026) & (\$ million)
- Table 20. Global 12 Inch PVD System Revenue Market Share by Application (2021-2026)
- Table 21. Global 12 Inch PVD System Sale Price by Application (2021-2026) & (K US\$/Unit)
- Table 22. Global 12 Inch PVD System Sales by Company (2021-2026) & (Units)
- Table 23. Global 12 Inch PVD System Sales Market Share by Company (2021-2026)
- Table 24. Global 12 Inch PVD System Revenue by Company (2021-2026) & (\$ millions)
- Table 25. Global 12 Inch PVD System Revenue Market Share by Company (2021-2026)

Table 26. Global 12 Inch PVD System Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 27. Key Manufacturers 12 Inch PVD System Producing Area Distribution and Sales Area

Table 28. Players 12 Inch PVD System Products Offered

Table 29. 12 Inch PVD System Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 30. New Products and Potential Entrants

Table 31. Market M&A Activity & Strategy

Table 32. Global 12 Inch PVD System Sales by Geographic Region (2021-2026) & (Units)

Table 33. Global 12 Inch PVD System Sales Market Share Geographic Region (2021-2026)

Table 34. Global 12 Inch PVD System Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 35. Global 12 Inch PVD System Revenue Market Share by Geographic Region (2021-2026)

Table 36. Global 12 Inch PVD System Sales by Country/Region (2021-2026) & (Units)

Table 37. Global 12 Inch PVD System Sales Market Share by Country/Region (2021-2026)

Table 38. Global 12 Inch PVD System Revenue by Country/Region (2021-2026) & (\$ millions)

Table 39. Global 12 Inch PVD System Revenue Market Share by Country/Region (2021-2026)

Table 40. Americas 12 Inch PVD System Sales by Country (2021-2026) & (Units)

Table 41. Americas 12 Inch PVD System Sales Market Share by Country (2021-2026)

Table 42. Americas 12 Inch PVD System Revenue by Country (2021-2026) & (\$ millions)

Table 43. Americas 12 Inch PVD System Sales by Type (2021-2026) & (Units)

Table 44. Americas 12 Inch PVD System Sales by Application (2021-2026) & (Units)

Table 45. APAC 12 Inch PVD System Sales by Region (2021-2026) & (Units)

Table 46. APAC 12 Inch PVD System Sales Market Share by Region (2021-2026)

Table 47. APAC 12 Inch PVD System Revenue by Region (2021-2026) & (\$ millions)

Table 48. APAC 12 Inch PVD System Sales by Type (2021-2026) & (Units)

Table 49. APAC 12 Inch PVD System Sales by Application (2021-2026) & (Units)

Table 50. Europe 12 Inch PVD System Sales by Country (2021-2026) & (Units)

Table 51. Europe 12 Inch PVD System Revenue by Country (2021-2026) & (\$ millions)

Table 52. Europe 12 Inch PVD System Sales by Type (2021-2026) & (Units)

Table 53. Europe 12 Inch PVD System Sales by Application (2021-2026) & (Units)

Table 54. Middle East & Africa 12 Inch PVD System Sales by Country (2021-2026) & (Units)

Table 55. Middle East & Africa 12 Inch PVD System Revenue Market Share by Country (2021-2026)

Table 56. Middle East & Africa 12 Inch PVD System Sales by Type (2021-2026) & (Units)

Table 57. Middle East & Africa 12 Inch PVD System Sales by Application (2021-2026) & (Units)

Table 58. Key Market Drivers & Growth Opportunities of 12 Inch PVD System

Table 59. Key Market Challenges & Risks of 12 Inch PVD System

Table 60. Key Industry Trends of 12 Inch PVD System

Table 61. 12 Inch PVD System Raw Material

Table 62. Key Suppliers of Raw Materials

Table 63. 12 Inch PVD System Distributors List

Table 64. 12 Inch PVD System Customer List

Table 65. Global 12 Inch PVD System Sales Forecast by Region (2027-2032) & (Units)

Table 66. Global 12 Inch PVD System Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 67. Americas 12 Inch PVD System Sales Forecast by Country (2027-2032) & (Units)

Table 68. Americas 12 Inch PVD System Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 69. APAC 12 Inch PVD System Sales Forecast by Region (2027-2032) & (Units)

Table 70. APAC 12 Inch PVD System Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 71. Europe 12 Inch PVD System Sales Forecast by Country (2027-2032) & (Units)

Table 72. Europe 12 Inch PVD System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 73. Middle East & Africa 12 Inch PVD System Sales Forecast by Country (2027-2032) & (Units)

Table 74. Middle East & Africa 12 Inch PVD System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 75. Global 12 Inch PVD System Sales Forecast by Type (2027-2032) & (Units)

Table 76. Global 12 Inch PVD System Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 77. Global 12 Inch PVD System Sales Forecast by Application (2027-2032) & (Units)

Table 78. Global 12 Inch PVD System Revenue Forecast by Application (2027-2032) &

(\$ millions)

Table 79. Applied Materials Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 80. Applied Materials 12 Inch PVD System Product Portfolios and Specifications

Table 81. Applied Materials 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 82. Applied Materials Main Business

Table 83. Applied Materials Latest Developments

Table 84. Lam Research Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 85. Lam Research 12 Inch PVD System Product Portfolios and Specifications

Table 86. Lam Research 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 87. Lam Research Main Business

Table 88. Lam Research Latest Developments

Table 89. Tokyo Electron Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 90. Tokyo Electron 12 Inch PVD System Product Portfolios and Specifications

Table 91. Tokyo Electron 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 92. Tokyo Electron Main Business

Table 93. Tokyo Electron Latest Developments

Table 94. ULVAC Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 95. ULVAC 12 Inch PVD System Product Portfolios and Specifications

Table 96. ULVAC 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 97. ULVAC Main Business

Table 98. ULVAC Latest Developments

Table 99. Canon Anelva Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 100. Canon Anelva 12 Inch PVD System Product Portfolios and Specifications

Table 101. Canon Anelva 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 102. Canon Anelva Main Business

Table 103. Canon Anelva Latest Developments

Table 104. Hitachi High-Tech Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 105. Hitachi High-Tech 12 Inch PVD System Product Portfolios and

Specifications

Table 106. Hitachi High-Tech 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 107. Hitachi High-Tech Main Business

Table 108. Hitachi High-Tech Latest Developments

Table 109. Kokusai Electric Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 110. Kokusai Electric 12 Inch PVD System Product Portfolios and Specifications

Table 111. Kokusai Electric 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 112. Kokusai Electric Main Business

Table 113. Kokusai Electric Latest Developments

Table 114. Evatec Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 115. Evatec 12 Inch PVD System Product Portfolios and Specifications

Table 116. Evatec 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 117. Evatec Main Business

Table 118. Evatec Latest Developments

Table 119. NAURA Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 120. NAURA 12 Inch PVD System Product Portfolios and Specifications

Table 121. NAURA 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 122. NAURA Main Business

Table 123. NAURA Latest Developments

Table 124. Piotech Basic Information, 12 Inch PVD System Manufacturing Base, Sales Area and Its Competitors

Table 125. Piotech 12 Inch PVD System Product Portfolios and Specifications

Table 126. Piotech 12 Inch PVD System Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 127. Piotech Main Business

Table 128. Piotech Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of 12 Inch PVD System
- Figure 2. 12 Inch PVD System Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global 12 Inch PVD System Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global 12 Inch PVD System Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. 12 Inch PVD System Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. 12 Inch PVD System Sales Market Share by Country/Region (2025)
- Figure 10. 12 Inch PVD System Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Single-chamber
- Figure 12. Product Picture of Multi-chamber
- Figure 13. Global 12 Inch PVD System Sales Market Share by Type in 2026
- Figure 14. Global 12 Inch PVD System Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Magnetron Sputtering
- Figure 16. Product Picture of Evaporation-based
- Figure 17. Global 12 Inch PVD System Sales Market Share by Deposition Technology in 2026
- Figure 18. Global 12 Inch PVD System Revenue Market Share by Deposition Technology (2021-2026)
- Figure 19. 12 Inch PVD System Consumed in Logic Device
- Figure 20. Global 12 Inch PVD System Market: Logic Device (2021-2026) & (Units)
- Figure 21. 12 Inch PVD System Consumed in Memory Device
- Figure 22. Global 12 Inch PVD System Market: Memory Device (2021-2026) & (Units)
- Figure 23. 12 Inch PVD System Consumed in Power Device
- Figure 24. Global 12 Inch PVD System Market: Power Device (2021-2026) & (Units)
- Figure 25. 12 Inch PVD System Consumed in Others
- Figure 26. Global 12 Inch PVD System Market: Others (2021-2026) & (Units)
- Figure 27. Global 12 Inch PVD System Sale Market Share by Application (2025)
- Figure 28. Global 12 Inch PVD System Revenue Market Share by Application in 2025
- Figure 29. 12 Inch PVD System Sales by Company in 2025 (Units)
- Figure 30. Global 12 Inch PVD System Sales Market Share by Company in 2025
- Figure 31. 12 Inch PVD System Revenue by Company in 2025 (\$ millions)

Figure 32. Global 12 Inch PVD System Revenue Market Share by Company in 2025

Figure 33. Global 12 Inch PVD System Sales Market Share by Geographic Region (2021-2026)

Figure 34. Global 12 Inch PVD System Revenue Market Share by Geographic Region in 2025

Figure 35. Americas 12 Inch PVD System Sales 2021-2026 (Units)

Figure 36. Americas 12 Inch PVD System Revenue 2021-2026 (\$ millions)

Figure 37. APAC 12 Inch PVD System Sales 2021-2026 (Units)

Figure 38. APAC 12 Inch PVD System Revenue 2021-2026 (\$ millions)

Figure 39. Europe 12 Inch PVD System Sales 2021-2026 (Units)

Figure 40. Europe 12 Inch PVD System Revenue 2021-2026 (\$ millions)

Figure 41. Middle East & Africa 12 Inch PVD System Sales 2021-2026 (Units)

Figure 42. Middle East & Africa 12 Inch PVD System Revenue 2021-2026 (\$ millions)

Figure 43. Americas 12 Inch PVD System Sales Market Share by Country in 2025

Figure 44. Americas 12 Inch PVD System Revenue Market Share by Country (2021-2026)

Figure 45. Americas 12 Inch PVD System Sales Market Share by Type (2021-2026)

Figure 46. Americas 12 Inch PVD System Sales Market Share by Application (2021-2026)

Figure 47. United States 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 48. Canada 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 49. Mexico 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 50. Brazil 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 51. APAC 12 Inch PVD System Sales Market Share by Region in 2025

Figure 52. APAC 12 Inch PVD System Revenue Market Share by Region (2021-2026)

Figure 53. APAC 12 Inch PVD System Sales Market Share by Type (2021-2026)

Figure 54. APAC 12 Inch PVD System Sales Market Share by Application (2021-2026)

Figure 55. China 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 56. Japan 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 57. South Korea 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 58. Southeast Asia 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 59. India 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 60. Australia 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 61. China Taiwan 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 62. Europe 12 Inch PVD System Sales Market Share by Country in 2025

Figure 63. Europe 12 Inch PVD System Revenue Market Share by Country (2021-2026)

Figure 64. Europe 12 Inch PVD System Sales Market Share by Type (2021-2026)

Figure 65. Europe 12 Inch PVD System Sales Market Share by Application (2021-2026)

Figure 66. Germany 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 67. France 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 68. UK 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 69. Italy 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 70. Russia 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 71. Middle East & Africa 12 Inch PVD System Sales Market Share by Country (2021-2026)

Figure 72. Middle East & Africa 12 Inch PVD System Sales Market Share by Type (2021-2026)

Figure 73. Middle East & Africa 12 Inch PVD System Sales Market Share by Application (2021-2026)

Figure 74. Egypt 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 75. South Africa 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 76. Israel 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 77. Turkey 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 78. GCC Countries 12 Inch PVD System Revenue Growth 2021-2026 (\$ millions)

Figure 79. Manufacturing Cost Structure Analysis of 12 Inch PVD System in 2026

Figure 80. Manufacturing Process Analysis of 12 Inch PVD System

Figure 81. Industry Chain Structure of 12 Inch PVD System

Figure 82. Channels of Distribution

Figure 83. Global 12 Inch PVD System Sales Market Forecast by Region (2027-2032)

Figure 84. Global 12 Inch PVD System Revenue Market Share Forecast by Region (2027-2032)

Figure 85. Global 12 Inch PVD System Sales Market Share Forecast by Type (2027-2032)

Figure 86. Global 12 Inch PVD System Revenue Market Share Forecast by Type (2027-2032)

Figure 87. Global 12 Inch PVD System Sales Market Share Forecast by Application (2027-2032)

Figure 88. Global 12 Inch PVD System Revenue Market Share Forecast by Application (2027-2032)

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