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Global Precision Motion Stages for Semiconductor Equipment Market Growth 2026-2032

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Abstracts

The global Precision Motion Stages for Semiconductor Equipment market size is predicted to grow from US$ 354 million in 2025 to US$ 772 million in 2032; it is expected to grow at a CAGR of 11.6% from 2026 to 2032.

Precision Motion Stages is a motion control system that can achieve micron or nanometer precision positioning. It is mainly composed of linear motors (drive units), precision grating scales (measurement feedback units) and linear guides (guide mechanisms). It achieves high-precision positioning in three-dimensional space through closed-loop control. Its positioning accuracy directly affects the processing or measurement capabilities of the equipment, while the movement speed and acceleration determine the production efficiency.

Structurally, a precision motion stage comprises a drive mechanism (for the precise control of output force and displacement) and a guidance mechanism (for transmitting motion and constraining direction), thereby ensuring motion stability and accuracy. Depending on the mode of motion, these stages can be categorized into types such as linear motion stages and rotary motion stages; in semiconductor equipment, they are primarily utilized in applications including wafer inspection, wafer bonding, lithography, etching, and back-end packaging equipment.

Precision motion stages for semiconductor equipment are core functional subsystems that enable high-precision positioning, high-dynamic motion, and stable process control across wafer fabrication, advanced packaging, and semiconductor inspection and metrology equipment. Their performance directly affects positioning accuracy, repeatability, motion speed, settling time, and ultimately process consistency and equipment productivity. Unlike conventional industrial automation stages,

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semiconductor precision motion stages are not simply combinations of mechanical structures and motors. They are highly integrated mechatronic systems incorporating precision mechanical architectures, linear motors, torque motors, voice-coil actuators, high-resolution encoders, motion controllers, air bearings or ultra-precision guideways, vibration isolation, and thermal management. They must also be engineered for demanding operating conditions, including vacuum environments, stringent cleanliness requirements, high acceleration, low particle generation, and nanometer- to submicron-level positioning. Accordingly, the industry is characterized by high technological barriers, long customer qualification cycles, extensive customization, and strong supplier stickiness.

From an application perspective, semiconductor equipment represents one of the most demanding and high-value markets for precision motion stages. Wafer inspection and metrology, lithography, coating and developing, etching, thin-film deposition, ion implantation, wafer handling, die bonding, wire bonding, and advanced packaging equipment all require precision motion functions, but the technical requirements vary considerably by process. Lithography, inspection, and metrology systems place particular emphasis on nanometer- to submicron-level positioning, ultra-low vibration, high trajectory accuracy, and rapid settling. Die bonding, wire bonding, and advanced packaging equipment generally require high-speed repetitive motion, high repeatability, and precise multi-axis coordination. Vacuum process equipment introduces additional requirements, including vacuum compatibility, low outgassing, particle control, and specialized thermal management.

From a competitive perspective, the global high-end precision motion stage market has historically been led by specialized suppliers from Europe, the United States, Japan, and other parts of Asia. Competition is increasingly shifting from the performance of individual components, such as motors, guideways, or encoders, toward system-level capabilities covering mechanical design, actuation, feedback control, motion algorithms, software integration, thermal compensation, and process-specific adaptation. For semiconductor equipment OEMs, long-term stability, repeatability under real process conditions, reliability, engineering support, and qualification history are often more important than component-level specifications alone. Once a stage supplier is qualified for a production tool platform, switching costs can be substantial, creating relatively high barriers for new entrants.

China is becoming one of the most important markets driving structural change in the global precision motion stage industry. As domestic semiconductor equipment manufacturers move into more advanced process segments, local suppliers are

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progressing from the integration of standard motion modules toward the independent development of direct-drive stages, air-bearing stages, wafer stages, and multi-degree-of-freedom precision positioning stages. Domestic suppliers have already established increasing substitution potential in selected packaging, inspection, handling, and broader semiconductor equipment applications. However, gaps remain in high-end lithography, advanced metrology, and other applications requiring nanometer-level positioning, ultra-high dynamic performance, and long-term stability, where leading international suppliers continue to maintain technical advantages.

Overall, precision motion stages for semiconductor equipment are evolving from traditional precision mechanical components into highly integrated motion-control subsystems. Continued scaling of wafer fabrication technologies, increasing complexity of advanced packaging, the growing intensity of inspection and metrology steps, and the localization of semiconductor equipment are expected to support sustained demand for high-precision, multi-axis, high-dynamic, low-vibration, and vacuum-compatible motion stages.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Precision Motion Stages for Semiconductor Equipment 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 Precision Motion Stages for Semiconductor Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Precision Motion Stages for Semiconductor Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Precision Motion Stages for Semiconductor Equipment

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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 Precision Motion Stages for Semiconductor Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Precision Motion Stages for Semiconductor Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Single-axis linear Stages

Multi-axis Stages

Segmentation by Bearing:

Mechanical Bearing Stages

Air-bearing Stages

Segmentation by Motion:

Linear Stage

Rotary Stage

Segmentation by Application:

Metrology & Inspection

Lithography

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Laser Scribing/Dicing

Bonding/Packaging Equipment

Wafer Prober

Thin-film Deposition

Cleaning/Wet Processing Equipment

CMP

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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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.

MKS Instruments

PI (Hoerbiger)

Sumitomo Heavy Industries

Akribis Systems Pte Ltd

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Beijing U-PRECISION

Hiwin Mikrosystem Corp

Shanghai Yinguan Semiconductor Technology

Cronus

THK Precision

Aerotech

NSK

Schneeberger Group

IKO Nippon Thompson

SmarAct GmbH

Steinmeyer Mechatronik GmbH

Harbin Core Tomorrow Science and Technology Co., Ltd

Wuxi CORETECH

Eitzenberger

LAB Motion Systems

Sanying Motion Control Instruments Ltd

ETEL SA

Jiangsu Jitri-uptech

TOYO Automation

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PM BV

TRI-N CO., LTD

ALIO Industries (Allient)

Mager Srl

Albert (Suzhou) Technology

SURUGA SEIKI Co., Ltd

Wuxi Xivi Technology Co., Ltd

Beijing AUS-PRECISION

PBA Systems Pte Ltd

Key Questions Addressed in this Report

What is the 10-year outlook for the global Precision Motion Stages for Semiconductor Equipment market?

What factors are driving Precision Motion Stages for Semiconductor Equipment market growth, globally and by region?

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

How do Precision Motion Stages for Semiconductor Equipment market opportunities vary by end market size?

How does Precision Motion Stages for Semiconductor Equipment break out by Type, by Application?

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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 Precision Motion Stages for Semiconductor Equipment Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Precision Motion Stages for Semiconductor Equipment by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Precision Motion Stages for Semiconductor Equipment by Country/Region, 2021, 2025 & 2032
2.2 Precision Motion Stages for Semiconductor Equipment Segment by Type
  2.2.1 Single-axis linear Stages
  2.2.2 Multi-axis Stages
  2.2.3 Precision Motion Stages for Semiconductor Equipment Sales by Type
    2.2.3.1 Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Type (2021-2026)
    2.2.3.2 Global Precision Motion Stages for Semiconductor Equipment Revenue and Market Share by Type (2021-2026)
    2.2.3.3 Global Precision Motion Stages for Semiconductor Equipment Sale Price by Type (2021-2026)
2.3 Precision Motion Stages for Semiconductor Equipment Segment by Bearing
  2.3.1 Mechanical Bearing Stages
  2.3.2 Air-bearing Stages
  2.3.3 Precision Motion Stages for Semiconductor Equipment Sales by Bearing
    2.3.3.1 Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Bearing (2021-2026)
    2.3.3.2 Global Precision Motion Stages for Semiconductor Equipment Revenue and

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Market Share by Bearing (2021-2026)
2.3.3.3 Global Precision Motion Stages for Semiconductor Equipment Sale Price by Bearing (2021-2026)
2.4 Precision Motion Stages for Semiconductor Equipment Segment by Motion
2.4.1 Linear Stage
2.4.2 Rotary Stage
2.4.3 Precision Motion Stages for Semiconductor Equipment Sales by Motion
2.4.3.1 Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Motion (2021-2026)
2.4.3.2 Global Precision Motion Stages for Semiconductor Equipment Revenue and Market Share by Motion (2021-2026)
2.4.3.3 Global Precision Motion Stages for Semiconductor Equipment Sale Price by Motion (2021-2026)
2.5 Precision Motion Stages for Semiconductor Equipment Segment by Application
2.5.1 Metrology & Inspection
2.5.2 Lithography
2.5.3 Laser Scribing/Dicing
2.5.4 Bonding/Packaging Equipment
2.5.5 Wafer Prober
2.5.6 Thin-film Deposition
2.5.7 Cleaning/Wet Processing Equipment
2.5.8 CMP
2.5.9 Others
2.5.10 Precision Motion Stages for Semiconductor Equipment Sales by Application
2.5.10.1 Global Precision Motion Stages for Semiconductor Equipment Sale Market Share by Application (2021-2026)
2.5.10.2 Global Precision Motion Stages for Semiconductor Equipment Revenue and Market Share by Application (2021-2026)
2.5.10.3 Global Precision Motion Stages for Semiconductor Equipment Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Precision Motion Stages for Semiconductor Equipment Breakdown Data by Company
3.1.1 Global Precision Motion Stages for Semiconductor Equipment Annual Sales by Company (2021-2026)
3.1.2 Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Company (2021-2026)

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3.2 Global Precision Motion Stages for Semiconductor Equipment Annual Revenue by Company (2021-2026)
3.2.1 Global Precision Motion Stages for Semiconductor Equipment Revenue by Company (2021-2026)
3.2.2 Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Company (2021-2026)
3.3 Global Precision Motion Stages for Semiconductor Equipment Sale Price by Company
3.4 Key Manufacturers Precision Motion Stages for Semiconductor Equipment Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Precision Motion Stages for Semiconductor Equipment Product Location Distribution
3.4.2 Players Precision Motion Stages for Semiconductor Equipment 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 PRECISION MOTION STAGES FOR SEMICONDUCTOR EQUIPMENT BY GEOGRAPHIC REGION

4.1 World Historic Precision Motion Stages for Semiconductor Equipment Market Size by Geographic Region (2021-2026)
4.1.1 Global Precision Motion Stages for Semiconductor Equipment Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Precision Motion Stages for Semiconductor Equipment Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Precision Motion Stages for Semiconductor Equipment Market Size by Country/Region (2021-2026)
4.2.1 Global Precision Motion Stages for Semiconductor Equipment Annual Sales by Country/Region (2021-2026)
4.2.2 Global Precision Motion Stages for Semiconductor Equipment Annual Revenue by Country/Region (2021-2026)
4.3 Americas Precision Motion Stages for Semiconductor Equipment Sales Growth
4.4 APAC Precision Motion Stages for Semiconductor Equipment Sales Growth
4.5 Europe Precision Motion Stages for Semiconductor Equipment Sales Growth
4.6 Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales Growth

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5 AMERICAS

5.1 Americas Precision Motion Stages for Semiconductor Equipment Sales by Country
5.1.1 Americas Precision Motion Stages for Semiconductor Equipment Sales by Country (2021-2026)
5.1.2 Americas Precision Motion Stages for Semiconductor Equipment Revenue by Country (2021-2026)
5.2 Americas Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026)
5.3 Americas Precision Motion Stages for Semiconductor Equipment Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Precision Motion Stages for Semiconductor Equipment Sales by Region
6.1.1 APAC Precision Motion Stages for Semiconductor Equipment Sales by Region (2021-2026)
6.1.2 APAC Precision Motion Stages for Semiconductor Equipment Revenue by Region (2021-2026)
6.2 APAC Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026)
6.3 APAC Precision Motion Stages for Semiconductor Equipment 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 Precision Motion Stages for Semiconductor Equipment by Country

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7.1.1 Europe Precision Motion Stages for Semiconductor Equipment Sales by Country (2021-2026)
7.1.2 Europe Precision Motion Stages for Semiconductor Equipment Revenue by Country (2021-2026)
7.2 Europe Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026)
7.3 Europe Precision Motion Stages for Semiconductor Equipment 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 Precision Motion Stages for Semiconductor Equipment by Country
8.1.1 Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales by Country (2021-2026)
8.1.2 Middle East & Africa Precision Motion Stages for Semiconductor Equipment Revenue by Country (2021-2026)
8.2 Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026)
8.3 Middle East & Africa Precision Motion Stages for Semiconductor Equipment 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

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10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Precision Motion Stages for Semiconductor Equipment
10.3 Manufacturing Process Analysis of Precision Motion Stages for Semiconductor Equipment
10.4 Industry Chain Structure of Precision Motion Stages for Semiconductor Equipment

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Precision Motion Stages for Semiconductor Equipment Distributors
11.3 Precision Motion Stages for Semiconductor Equipment Customer

12 WORLD FORECAST REVIEW FOR PRECISION MOTION STAGES FOR SEMICONDUCTOR EQUIPMENT BY GEOGRAPHIC REGION

12.1 Global Precision Motion Stages for Semiconductor Equipment Market Size Forecast by Region
  12.1.1 Global Precision Motion Stages for Semiconductor Equipment Forecast by Region (2027-2032)
  12.1.2 Global Precision Motion Stages for Semiconductor Equipment 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 Precision Motion Stages for Semiconductor Equipment Forecast by Type (2027-2032)
12.7 Global Precision Motion Stages for Semiconductor Equipment Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 MKS Instruments
  13.1.1 MKS Instruments Company Information
  13.1.2 MKS Instruments Precision Motion Stages for Semiconductor Equipment

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Product Portfolios and Specifications
13.1.3 MKS Instruments Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 MKS Instruments Main Business Overview
13.1.5 MKS Instruments Latest Developments
13.2 PI (Hoerbiger)
13.2.1 PI (Hoerbiger) Company Information
13.2.2 PI (Hoerbiger) Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.2.3 PI (Hoerbiger) Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 PI (Hoerbiger) Main Business Overview
13.2.5 PI (Hoerbiger) Latest Developments
13.3 Sumitomo Heavy Industries
13.3.1 Sumitomo Heavy Industries Company Information
13.3.2 Sumitomo Heavy Industries Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.3.3 Sumitomo Heavy Industries Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Sumitomo Heavy Industries Main Business Overview
13.3.5 Sumitomo Heavy Industries Latest Developments
13.4 Akribis Systems Pte Ltd
13.4.1 Akribis Systems Pte Ltd Company Information
13.4.2 Akribis Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.4.3 Akribis Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Akribis Systems Pte Ltd Main Business Overview
13.4.5 Akribis Systems Pte Ltd Latest Developments
13.5 Beijing U-PRECISION
13.5.1 Beijing U-PRECISION Company Information
13.5.2 Beijing U-PRECISION Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.5.3 Beijing U-PRECISION Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Beijing U-PRECISION Main Business Overview
13.5.5 Beijing U-PRECISION Latest Developments
13.6 Hiwin Mikrosystem Corp
13.6.1 Hiwin Mikrosystem Corp Company Information

+357 96 030922
info@marketpublishers.com

13.6.2 Hiwin Mikrosystem Corp Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.6.3 Hiwin Mikrosystem Corp Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Hiwin Mikrosystem Corp Main Business Overview
13.6.5 Hiwin Mikrosystem Corp Latest Developments
13.7 Shanghai Yinguan Semiconductor Technology
13.7.1 Shanghai Yinguan Semiconductor Technology Company Information
13.7.2 Shanghai Yinguan Semiconductor Technology Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.7.3 Shanghai Yinguan Semiconductor Technology Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Shanghai Yinguan Semiconductor Technology Main Business Overview
13.7.5 Shanghai Yinguan Semiconductor Technology Latest Developments
13.8 Cronus
13.8.1 Cronus Company Information
13.8.2 Cronus Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.8.3 Cronus Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Cronus Main Business Overview
13.8.5 Cronus Latest Developments
13.9 THK Precision
13.9.1 THK Precision Company Information
13.9.2 THK Precision Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.9.3 THK Precision Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 THK Precision Main Business Overview
13.9.5 THK Precision Latest Developments
13.10 Aerotech
13.10.1 Aerotech Company Information
13.10.2 Aerotech Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.10.3 Aerotech Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Aerotech Main Business Overview
13.10.5 Aerotech Latest Developments
13.11 NSK

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13.11.1 NSK Company Information
13.11.2 NSK Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.11.3 NSK Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 NSK Main Business Overview
13.11.5 NSK Latest Developments
13.12 Schneeberger Group
13.12.1 Schneeberger Group Company Information
13.12.2 Schneeberger Group Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.12.3 Schneeberger Group Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Schneeberger Group Main Business Overview
13.12.5 Schneeberger Group Latest Developments
13.13 IKO Nippon Thompson
13.13.1 IKO Nippon Thompson Company Information
13.13.2 IKO Nippon Thompson Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.13.3 IKO Nippon Thompson Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 IKO Nippon Thompson Main Business Overview
13.13.5 IKO Nippon Thompson Latest Developments
13.14 SmarAct GmbH
13.14.1 SmarAct GmbH Company Information
13.14.2 SmarAct GmbH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.14.3 SmarAct GmbH Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 SmarAct GmbH Main Business Overview
13.14.5 SmarAct GmbH Latest Developments
13.15 Steinmeyer Mechatronik GmbH
13.15.1 Steinmeyer Mechatronik GmbH Company Information
13.15.2 Steinmeyer Mechatronik GmbH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.15.3 Steinmeyer Mechatronik GmbH Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Steinmeyer Mechatronik GmbH Main Business Overview
13.15.5 Steinmeyer Mechatronik GmbH Latest Developments

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info@marketpublishers.com

13.16 Harbin Core Tomorrow Science and Technology Co., Ltd
13.16.1 Harbin Core Tomorrow Science and Technology Co., Ltd Company Information
13.16.2 Harbin Core Tomorrow Science and Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.16.3 Harbin Core Tomorrow Science and Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Harbin Core Tomorrow Science and Technology Co., Ltd Main Business Overview
13.16.5 Harbin Core Tomorrow Science and Technology Co., Ltd Latest Developments
13.17 Wuxi CORETECH
13.17.1 Wuxi CORETECH Company Information
13.17.2 Wuxi CORETECH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.17.3 Wuxi CORETECH Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Wuxi CORETECH Main Business Overview
13.17.5 Wuxi CORETECH Latest Developments
13.18 Eitzenberger
13.18.1 Eitzenberger Company Information
13.18.2 Eitzenberger Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.18.3 Eitzenberger Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Eitzenberger Main Business Overview
13.18.5 Eitzenberger Latest Developments
13.19 LAB Motion Systems
13.19.1 LAB Motion Systems Company Information
13.19.2 LAB Motion Systems Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.19.3 LAB Motion Systems Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 LAB Motion Systems Main Business Overview
13.19.5 LAB Motion Systems Latest Developments
13.20 Sanying Motion Control Instruments Ltd
13.20.1 Sanying Motion Control Instruments Ltd Company Information
13.20.2 Sanying Motion Control Instruments Ltd Precision Motion Stages for

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Semiconductor Equipment Product Portfolios and Specifications
13.20.3 Sanying Motion Control Instruments Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Sanying Motion Control Instruments Ltd Main Business Overview
13.20.5 Sanying Motion Control Instruments Ltd Latest Developments
13.21 ETEL SA
13.21.1 ETEL SA Company Information
13.21.2 ETEL SA Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.21.3 ETEL SA Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 ETEL SA Main Business Overview
13.21.5 ETEL SA Latest Developments
13.22 Jiangsu Jitri-uptech
13.22.1 Jiangsu Jitri-uptech Company Information
13.22.2 Jiangsu Jitri-uptech Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.22.3 Jiangsu Jitri-uptech Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Jiangsu Jitri-uptech Main Business Overview
13.22.5 Jiangsu Jitri-uptech Latest Developments
13.23 TOYO Automation
13.23.1 TOYO Automation Company Information
13.23.2 TOYO Automation Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.23.3 TOYO Automation Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 TOYO Automation Main Business Overview
13.23.5 TOYO Automation Latest Developments
13.24 PM BV
13.24.1 PM BV Company Information
13.24.2 PM BV Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.24.3 PM BV Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 PM BV Main Business Overview
13.24.5 PM BV Latest Developments
13.25 TRI-N CO., LTD
13.25.1 TRI-N CO., LTD Company Information

+357 96 030922
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13.25.2 TRI-N CO., LTD Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.25.3 TRI-N CO., LTD Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 TRI-N CO., LTD Main Business Overview
13.25.5 TRI-N CO., LTD Latest Developments
13.26 ALIO Industries (Allient)
13.26.1 ALIO Industries (Allient) Company Information
13.26.2 ALIO Industries (Allient) Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.26.3 ALIO Industries (Allient) Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 ALIO Industries (Allient) Main Business Overview
13.26.5 ALIO Industries (Allient) Latest Developments
13.27 Mager Srl
13.27.1 Mager Srl Company Information
13.27.2 Mager Srl Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.27.3 Mager Srl Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.27.4 Mager Srl Main Business Overview
13.27.5 Mager Srl Latest Developments
13.28 Albert (Suzhou) Technology
13.28.1 Albert (Suzhou) Technology Company Information
13.28.2 Albert (Suzhou) Technology Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.28.3 Albert (Suzhou) Technology Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.28.4 Albert (Suzhou) Technology Main Business Overview
13.28.5 Albert (Suzhou) Technology Latest Developments
13.29 SURUGA SEIKI Co., Ltd
13.29.1 SURUGA SEIKI Co., Ltd Company Information
13.29.2 SURUGA SEIKI Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.29.3 SURUGA SEIKI Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.29.4 SURUGA SEIKI Co., Ltd Main Business Overview
13.29.5 SURUGA SEIKI Co., Ltd Latest Developments
13.30 Wuxi Xivi Technology Co., Ltd

+357 96 030922
info@marketpublishers.com

13.30.1 Wuxi Xivi Technology Co., Ltd Company Information
13.30.2 Wuxi Xivi Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.30.3 Wuxi Xivi Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.30.4 Wuxi Xivi Technology Co., Ltd Main Business Overview
13.30.5 Wuxi Xivi Technology Co., Ltd Latest Developments
13.31 Beijing AUS-PRECISION
13.31.1 Beijing AUS-PRECISION Company Information
13.31.2 Beijing AUS-PRECISION Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.31.3 Beijing AUS-PRECISION Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.31.4 Beijing AUS-PRECISION Main Business Overview
13.31.5 Beijing AUS-PRECISION Latest Developments
13.32 PBA Systems Pte Ltd
13.32.1 PBA Systems Pte Ltd Company Information
13.32.2 PBA Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
13.32.3 PBA Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Sales, Revenue, Price and Gross Margin (2021-2026)
13.32.4 PBA Systems Pte Ltd Main Business Overview
13.32.5 PBA Systems Pte Ltd Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Precision Motion Stages for Semiconductor Equipment Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Precision Motion Stages for Semiconductor Equipment Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Single-axis linear Stages
Table 4. Major Players of Multi-axis Stages
Table 5. Global Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026) & (Units)
Table 6. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Type (2021-2026)
Table 7. Global Precision Motion Stages for Semiconductor Equipment Revenue by Type (2021-2026) & ($ million)
Table 8. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Type (2021-2026)
Table 9. Global Precision Motion Stages for Semiconductor Equipment Sale Price by Type (2021-2026) & (K US$/Unit)
Table 10. Major Players of Mechanical Bearing Stages
Table 11. Major Players of Air-bearing Stages
Table 12. Global Precision Motion Stages for Semiconductor Equipment Sales by Bearing (2021-2026) & (Units)
Table 13. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Bearing (2021-2026)
Table 14. Global Precision Motion Stages for Semiconductor Equipment Revenue by Bearing (2021-2026) & ($ million)
Table 15. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Bearing (2021-2026)
Table 16. Global Precision Motion Stages for Semiconductor Equipment Sale Price by Bearing (2021-2026) & (K US$/Unit)
Table 17. Major Players of Linear Stage
Table 18. Major Players of Rotary Stage
Table 19. Global Precision Motion Stages for Semiconductor Equipment Sales by Motion (2021-2026) & (Units)
Table 20. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Motion (2021-2026)
Table 21. Global Precision Motion Stages for Semiconductor Equipment Revenue by

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Motion (2021-2026) & ($ million)
Table 22. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Motion (2021-2026)
Table 23. Global Precision Motion Stages for Semiconductor Equipment Sale Price by Motion (2021-2026) & (K US$/Unit)
Table 24. Global Precision Motion Stages for Semiconductor Equipment Sale by Application (2021-2026) & (Units)
Table 25. Global Precision Motion Stages for Semiconductor Equipment Sale Market Share by Application (2021-2026)
Table 26. Global Precision Motion Stages for Semiconductor Equipment Revenue by Application (2021-2026) & ($ million)
Table 27. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Application (2021-2026)
Table 28. Global Precision Motion Stages for Semiconductor Equipment Sale Price by Application (2021-2026) & (K US$/Unit)
Table 29. Global Precision Motion Stages for Semiconductor Equipment Sales by Company (2021-2026) & (Units)
Table 30. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Company (2021-2026)
Table 31. Global Precision Motion Stages for Semiconductor Equipment Revenue by Company (2021-2026) & ($ millions)
Table 32. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Company (2021-2026)
Table 33. Global Precision Motion Stages for Semiconductor Equipment Sale Price by Company (2021-2026) & (K US$/Unit)
Table 34. Key Manufacturers Precision Motion Stages for Semiconductor Equipment Producing Area Distribution and Sales Area
Table 35. Players Precision Motion Stages for Semiconductor Equipment Products Offered
Table 36. Precision Motion Stages for Semiconductor Equipment Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 37. New Products and Potential Entrants
Table 38. Market M&A Activity & Strategy
Table 39. Global Precision Motion Stages for Semiconductor Equipment Sales by Geographic Region (2021-2026) & (Units)
Table 40. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share Geographic Region (2021-2026)
Table 41. Global Precision Motion Stages for Semiconductor Equipment Revenue by Geographic Region (2021-2026) & ($ millions)

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Table 42. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Geographic Region (2021-2026)
Table 43. Global Precision Motion Stages for Semiconductor Equipment Sales by Country/Region (2021-2026) & (Units)
Table 44. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Country/Region (2021-2026)
Table 45. Global Precision Motion Stages for Semiconductor Equipment Revenue by Country/Region (2021-2026) & ($ millions)
Table 46. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Country/Region (2021-2026)
Table 47. Americas Precision Motion Stages for Semiconductor Equipment Sales by Country (2021-2026) & (Units)
Table 48. Americas Precision Motion Stages for Semiconductor Equipment Sales Market Share by Country (2021-2026)
Table 49. Americas Precision Motion Stages for Semiconductor Equipment Revenue by Country (2021-2026) & ($ millions)
Table 50. Americas Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026) & (Units)
Table 51. Americas Precision Motion Stages for Semiconductor Equipment Sales by Application (2021-2026) & (Units)
Table 52. APAC Precision Motion Stages for Semiconductor Equipment Sales by Region (2021-2026) & (Units)
Table 53. APAC Precision Motion Stages for Semiconductor Equipment Sales Market Share by Region (2021-2026)
Table 54. APAC Precision Motion Stages for Semiconductor Equipment Revenue by Region (2021-2026) & ($ millions)
Table 55. APAC Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026) & (Units)
Table 56. APAC Precision Motion Stages for Semiconductor Equipment Sales by Application (2021-2026) & (Units)
Table 57. Europe Precision Motion Stages for Semiconductor Equipment Sales by Country (2021-2026) & (Units)
Table 58. Europe Precision Motion Stages for Semiconductor Equipment Revenue by Country (2021-2026) & ($ millions)
Table 59. Europe Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026) & (Units)
Table 60. Europe Precision Motion Stages for Semiconductor Equipment Sales by Application (2021-2026) & (Units)
Table 61. Middle East & Africa Precision Motion Stages for Semiconductor Equipment

+357 96 030922
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Sales by Country (2021-2026) & (Units)
Table 62. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Country (2021-2026)
Table 63. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales by Type (2021-2026) & (Units)
Table 64. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales by Application (2021-2026) & (Units)
Table 65. Key Market Drivers & Growth Opportunities of Precision Motion Stages for Semiconductor Equipment
Table 66. Key Market Challenges & Risks of Precision Motion Stages for Semiconductor Equipment
Table 67. Key Industry Trends of Precision Motion Stages for Semiconductor Equipment
Table 68. Precision Motion Stages for Semiconductor Equipment Raw Material
Table 69. Key Suppliers of Raw Materials
Table 70. Precision Motion Stages for Semiconductor Equipment Distributors List
Table 71. Precision Motion Stages for Semiconductor Equipment Customer List
Table 72. Global Precision Motion Stages for Semiconductor Equipment Sales Forecast by Region (2027-2032) & (Units)
Table 73. Global Precision Motion Stages for Semiconductor Equipment Revenue Forecast by Region (2027-2032) & ($ millions)
Table 74. Americas Precision Motion Stages for Semiconductor Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 75. Americas Precision Motion Stages for Semiconductor Equipment Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 76. APAC Precision Motion Stages for Semiconductor Equipment Sales Forecast by Region (2027-2032) & (Units)
Table 77. APAC Precision Motion Stages for Semiconductor Equipment Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 78. Europe Precision Motion Stages for Semiconductor Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 79. Europe Precision Motion Stages for Semiconductor Equipment Revenue Forecast by Country (2027-2032) & ($ millions)
Table 80. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales Forecast by Country (2027-2032) & (Units)
Table 81. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Revenue Forecast by Country (2027-2032) & ($ millions)
Table 82. Global Precision Motion Stages for Semiconductor Equipment Sales Forecast by Type (2027-2032) & (Units)

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Table 83. Global Precision Motion Stages for Semiconductor Equipment Revenue Forecast by Type (2027-2032) & ($ millions)
Table 84. Global Precision Motion Stages for Semiconductor Equipment Sales Forecast by Application (2027-2032) & (Units)
Table 85. Global Precision Motion Stages for Semiconductor Equipment Revenue Forecast by Application (2027-2032) & ($ millions)
Table 86. MKS Instruments Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 87. MKS Instruments Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 88. MKS Instruments Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 89. MKS Instruments Main Business
Table 90. MKS Instruments Latest Developments
Table 91. PI (Hoerbiger) Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 92. PI (Hoerbiger) Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 93. PI (Hoerbiger) Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 94. PI (Hoerbiger) Main Business
Table 95. PI (Hoerbiger) Latest Developments
Table 96. Sumitomo Heavy Industries Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 97. Sumitomo Heavy Industries Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 98. Sumitomo Heavy Industries Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 99. Sumitomo Heavy Industries Main Business
Table 100. Sumitomo Heavy Industries Latest Developments
Table 101. Akribis Systems Pte Ltd Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 102. Akribis Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 103. Akribis Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 104. Akribis Systems Pte Ltd Main Business

+357 96 030922
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Table 105. Akribis Systems Pte Ltd Latest Developments
Table 106. Beijing U-PRECISION Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 107. Beijing U-PRECISION Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 108. Beijing U-PRECISION Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 109. Beijing U-PRECISION Main Business
Table 110. Beijing U-PRECISION Latest Developments
Table 111. Hiwin Mikrosystem Corp Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 112. Hiwin Mikrosystem Corp Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 113. Hiwin Mikrosystem Corp Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 114. Hiwin Mikrosystem Corp Main Business
Table 115. Hiwin Mikrosystem Corp Latest Developments
Table 116. Shanghai Yinguan Semiconductor Technology Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 117. Shanghai Yinguan Semiconductor Technology Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 118. Shanghai Yinguan Semiconductor Technology Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 119. Shanghai Yinguan Semiconductor Technology Main Business
Table 120. Shanghai Yinguan Semiconductor Technology Latest Developments
Table 121. Cronus Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 122. Cronus Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 123. Cronus Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 124. Cronus Main Business
Table 125. Cronus Latest Developments
Table 126. THK Precision Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
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Table 127. THK Precision Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 128. THK Precision Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 129. THK Precision Main Business
Table 130. THK Precision Latest Developments
Table 131. Aerotech Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 132. Aerotech Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 133. Aerotech Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 134. Aerotech Main Business
Table 135. Aerotech Latest Developments
Table 136. NSK Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 137. NSK Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 138. NSK Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 139. NSK Main Business
Table 140. NSK Latest Developments
Table 141. Schneeberger Group Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 142. Schneeberger Group Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 143. Schneeberger Group Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 144. Schneeberger Group Main Business
Table 145. Schneeberger Group Latest Developments
Table 146. IKO Nippon Thompson Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 147. IKO Nippon Thompson Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 148. IKO Nippon Thompson Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 149. IKO Nippon Thompson Main Business
Table 150. IKO Nippon Thompson Latest Developments

+357 96 030922
info@marketpublishers.com

Table 151. SmarAct GmbH Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 152. SmarAct GmbH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 153. SmarAct GmbH Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 154. SmarAct GmbH Main Business
Table 155. SmarAct GmbH Latest Developments
Table 156. Steinmeyer Mechatronik GmbH Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 157. Steinmeyer Mechatronik GmbH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 158. Steinmeyer Mechatronik GmbH Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 159. Steinmeyer Mechatronik GmbH Main Business
Table 160. Steinmeyer Mechatronik GmbH Latest Developments
Table 161. Harbin Core Tomorrow Science and Technology Co., Ltd Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 162. Harbin Core Tomorrow Science and Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 163. Harbin Core Tomorrow Science and Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 164. Harbin Core Tomorrow Science and Technology Co., Ltd Main Business
Table 165. Harbin Core Tomorrow Science and Technology Co., Ltd Latest Developments
Table 166. Wuxi CORETECH Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 167. Wuxi CORETECH Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 168. Wuxi CORETECH Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 169. Wuxi CORETECH Main Business
Table 170. Wuxi CORETECH Latest Developments
Table 171. Eitzenberger Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 172. Eitzenberger Precision Motion Stages for Semiconductor Equipment Product

+357 96 030922
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Portfolios and Specifications
Table 173. Eitzenberger Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 174. Eitzenberger Main Business
Table 175. Eitzenberger Latest Developments
Table 176. LAB Motion Systems Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 177. LAB Motion Systems Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 178. LAB Motion Systems Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 179. LAB Motion Systems Main Business
Table 180. LAB Motion Systems Latest Developments
Table 181. Sanying Motion Control Instruments Ltd Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 182. Sanying Motion Control Instruments Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 183. Sanying Motion Control Instruments Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 184. Sanying Motion Control Instruments Ltd Main Business
Table 185. Sanying Motion Control Instruments Ltd Latest Developments
Table 186. ETEL SA Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 187. ETEL SA Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 188. ETEL SA Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 189. ETEL SA Main Business
Table 190. ETEL SA Latest Developments
Table 191. Jiangsu Jitri-uptech Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 192. Jiangsu Jitri-uptech Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 193. Jiangsu Jitri-uptech Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 194. Jiangsu Jitri-uptech Main Business
Table 195. Jiangsu Jitri-uptech Latest Developments

+357 96 030922
info@marketpublishers.com

Table 196. TOYO Automation Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 197. TOYO Automation Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 198. TOYO Automation Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 199. TOYO Automation Main Business
Table 200. TOYO Automation Latest Developments
Table 201. PM BV Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 202. PM BV Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 203. PM BV Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 204. PM BV Main Business
Table 205. PM BV Latest Developments
Table 206. TRI-N CO., LTD Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 207. TRI-N CO., LTD Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 208. TRI-N CO., LTD Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 209. TRI-N CO., LTD Main Business
Table 210. TRI-N CO., LTD Latest Developments
Table 211. ALIO Industries (Allient) Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 212. ALIO Industries (Allient) Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 213. ALIO Industries (Allient) Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 214. ALIO Industries (Allient) Main Business
Table 215. ALIO Industries (Allient) Latest Developments
Table 216. Mager Srl Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 217. Mager Srl Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 218. Mager Srl Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 219. Mager Srl Main Business
Table 220. Mager Srl Latest Developments
Table 221. Albert (Suzhou) Technology Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 222. Albert (Suzhou) Technology Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 223. Albert (Suzhou) Technology Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 224. Albert (Suzhou) Technology Main Business
Table 225. Albert (Suzhou) Technology Latest Developments
Table 226. SURUGA SEIKI Co., Ltd Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 227. SURUGA SEIKI Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 228. SURUGA SEIKI Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 229. SURUGA SEIKI Co., Ltd Main Business
Table 230. SURUGA SEIKI Co., Ltd Latest Developments
Table 231. Wuxi Xivi Technology Co., Ltd Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 232. Wuxi Xivi Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 233. Wuxi Xivi Technology Co., Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 234. Wuxi Xivi Technology Co., Ltd Main Business
Table 235. Wuxi Xivi Technology Co., Ltd Latest Developments
Table 236. Beijing AUS-PRECISION Basic Information, Precision Motion Stages for Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 237. Beijing AUS-PRECISION Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 238. Beijing AUS-PRECISION Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 239. Beijing AUS-PRECISION Main Business
Table 240. Beijing AUS-PRECISION Latest Developments
Table 241. PBA Systems Pte Ltd Basic Information, Precision Motion Stages for

+357 96 030922
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Semiconductor Equipment Manufacturing Base, Sales Area and Its Competitors
Table 242. PBA Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Product Portfolios and Specifications
Table 243. PBA Systems Pte Ltd Precision Motion Stages for Semiconductor Equipment Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 244. PBA Systems Pte Ltd Main Business
Table 245. PBA Systems Pte Ltd Latest Developments

+357 96 030922
info@marketpublishers.com

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Precision Motion Stages for Semiconductor Equipment
Figure 2. Precision Motion Stages for Semiconductor Equipment Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Precision Motion Stages for Semiconductor Equipment Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Precision Motion Stages for Semiconductor Equipment Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Precision Motion Stages for Semiconductor Equipment Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Precision Motion Stages for Semiconductor Equipment Sales Market Share by Country/Region (2025)
Figure 10. Precision Motion Stages for Semiconductor Equipment Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Single-axis linear Stages
Figure 12. Product Picture of Multi-axis Stages
Figure 13. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Type in 2026
Figure 14. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Type (2021-2026)
Figure 15. Product Picture of Mechanical Bearing Stages
Figure 16. Product Picture of Air-bearing Stages
Figure 17. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Bearing in 2026
Figure 18. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Bearing (2021-2026)
Figure 19. Product Picture of Linear Stage
Figure 20. Product Picture of Rotary Stage
Figure 21. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Motion in 2026
Figure 22. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Motion (2021-2026)
Figure 23. Precision Motion Stages for Semiconductor Equipment Consumed in

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Metrology & Inspection
Figure 24. Global Precision Motion Stages for Semiconductor Equipment Market: Metrology & Inspection (2021-2026) & (Units)
Figure 25. Precision Motion Stages for Semiconductor Equipment Consumed in Lithography
Figure 26. Global Precision Motion Stages for Semiconductor Equipment Market: Lithography (2021-2026) & (Units)
Figure 27. Precision Motion Stages for Semiconductor Equipment Consumed in Laser Scribing/Dicing
Figure 28. Global Precision Motion Stages for Semiconductor Equipment Market: Laser Scribing/Dicing (2021-2026) & (Units)
Figure 29. Precision Motion Stages for Semiconductor Equipment Consumed in Bonding/Packaging Equipment
Figure 30. Global Precision Motion Stages for Semiconductor Equipment Market: Bonding/Packaging Equipment (2021-2026) & (Units)
Figure 31. Precision Motion Stages for Semiconductor Equipment Consumed in Wafer Prober
Figure 32. Global Precision Motion Stages for Semiconductor Equipment Market: Wafer Prober (2021-2026) & (Units)
Figure 33. Precision Motion Stages for Semiconductor Equipment Consumed in Thin-film Deposition
Figure 34. Global Precision Motion Stages for Semiconductor Equipment Market: Thin-film Deposition (2021-2026) & (Units)
Figure 35. Precision Motion Stages for Semiconductor Equipment Consumed in Cleaning/Wet Processing Equipment
Figure 36. Global Precision Motion Stages for Semiconductor Equipment Market: Cleaning/Wet Processing Equipment (2021-2026) & (Units)
Figure 37. Precision Motion Stages for Semiconductor Equipment Consumed in CMP
Figure 38. Global Precision Motion Stages for Semiconductor Equipment Market: CMP (2021-2026) & (Units)
Figure 39. Precision Motion Stages for Semiconductor Equipment Consumed in Others
Figure 40. Global Precision Motion Stages for Semiconductor Equipment Market: Others (2021-2026) & (Units)
Figure 41. Global Precision Motion Stages for Semiconductor Equipment Sale Market Share by Application (2025)
Figure 42. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Application in 2025
Figure 43. Precision Motion Stages for Semiconductor Equipment Sales by Company in 2025 (Units)

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Figure 44. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Company in 2025
Figure 45. Precision Motion Stages for Semiconductor Equipment Revenue by Company in 2025 ($ millions)
Figure 46. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Company in 2025
Figure 47. Global Precision Motion Stages for Semiconductor Equipment Sales Market Share by Geographic Region (2021-2026)
Figure 48. Global Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Geographic Region in 2025
Figure 49. Americas Precision Motion Stages for Semiconductor Equipment Sales 2021-2026 (Units)
Figure 50. Americas Precision Motion Stages for Semiconductor Equipment Revenue 2021-2026 ($ millions)
Figure 51. APAC Precision Motion Stages for Semiconductor Equipment Sales 2021-2026 (Units)
Figure 52. APAC Precision Motion Stages for Semiconductor Equipment Revenue 2021-2026 ($ millions)
Figure 53. Europe Precision Motion Stages for Semiconductor Equipment Sales 2021-2026 (Units)
Figure 54. Europe Precision Motion Stages for Semiconductor Equipment Revenue 2021-2026 ($ millions)
Figure 55. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Sales 2021-2026 (Units)
Figure 56. Middle East & Africa Precision Motion Stages for Semiconductor Equipment Revenue 2021-2026 ($ millions)
Figure 57. Americas Precision Motion Stages for Semiconductor Equipment Sales Market Share by Country in 2025
Figure 58. Americas Precision Motion Stages for Semiconductor Equipment Revenue Market Share by Country (2021-2026)
Figure 59. Americas Precision Motion Stages for Semiconductor Equipment Sales Market Share by Type (2021-2026)
Figure 60. Americas Precision Motion Stages for Semiconductor Equipment Sales Market Share by Application (2021-2026)
Figure 61. United States Precision Motion Stages for Semiconductor Equipment Revenue Growth 2021-2026 ($ millions)
Figure 62. Canada Precision Motion Stages for Semiconductor Equipment Revenue Growth 2021-2026 ($ millions)

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