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Global Vacuum Components and Subsystems for Semiconductor Equipment Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Vacuum Components and Subsystems for Semiconductor Equipment market size is predicted to grow from US$ 4948 million in 2025 to US$ 7510 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 2032.

Vacuum Components and Subsystems for Semiconductor Equipment are core basic components of semiconductor manufacturing equipment, covering two core sectors: vacuum components and vacuum subsystems, which jointly provide stable and clean vacuum environment support for core semiconductor processes. Vacuum components are the basic units composing the subsystem, mainly including vacuum pumps, vacuum valves, vacuum gauges, seals, pipeline components, etc., each undertaking special functions such as vacuum generation, flow control, vacuum detection, and sealing isolation. Vacuum subsystems integrate various components to form a complete system that can be directly adapted to semiconductor processes, building and maintaining a high-cleanliness vacuum environment that meets strict requirements for core processes such as etching, thin film deposition, ion implantation, and photolithography, isolating external interference such as air, water vapor, and impurities, and avoiding affecting chip preparation accuracy and product yield. Such products have core characteristics such as high stability, high reliability, low leakage rate, and high-precision control, which can be flexibly customized according to the needs of different semiconductor processes. Widely used in various semiconductor chip manufacturing scenarios, they are key basic equipment to ensure efficient, accurate and stable semiconductor production, directly related to chip preparation quality and production efficiency.

The industrial chain of Vacuum Components and Subsystems for Semiconductor Equipment is divided into three core links: upstream raw materials and basic

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components, midstream component manufacturing and system integration, and downstream terminal applications. All links are closely linked to form a complete and collaborative industrial ecology. The upstream mainly includes basic raw materials such as metal materials, special rubber and plastics, precision electronic components, and ceramic materials, as well as basic supporting parts such as motors, sensors, and sealing materials, involving multiple supporting industries such as precision machinery processing, vacuum technology, electronic control, and special material synthesis. International enterprises have profound accumulation in the core technology of high-end vacuum components, holding core discourse power. The domestic supply chain is constantly improving, and local enterprises are accelerating the independent R&D of basic components and core technologies, continuously enhancing localized supporting capabilities. The midstream is divided into two sectors: one is the R&D, precision manufacturing and testing of vacuum components, and the other is the integration, assembly, debugging and customized development of vacuum subsystems. Participants include international professional vacuum equipment manufacturers, semiconductor supporting component enterprises and domestic local brands focusing on vacuum technology, focusing on optimizing product accuracy, compatibility and process adaptability. The downstream mainly faces semiconductor equipment manufacturers, supporting various core semiconductor manufacturing equipment, and ultimately serving semiconductor chip manufacturing enterprises, forming a stable supply and demand cycle system relying on the continuous development of the semiconductor industry.

The global semiconductor industry continues to iterate towards high-end and refinement, with continuous upgrading of chip processes, and increasingly strict requirements on the performance of semiconductor manufacturing equipment, directly driving the steady growth of market demand for vacuum components and subsystems for semiconductor equipment. The development trend of miniaturization and high integration of semiconductor chips has continuously improved the requirements for the cleanliness, stability and control accuracy of the vacuum environment in core processes such as etching and thin film deposition. Traditional vacuum components and subsystems are gradually replaced by high-performance and high-precision products, promoting the continuous improvement of market penetration. At the same time, the global semiconductor production capacity continues to expand, the localization substitution process accelerates, and the domestic semiconductor equipment manufacturing industry develops rapidly, providing a broad market space for local vacuum components and subsystems enterprises. In terms of industry competition, international brands occupy the high-end market with mature technology and stable product quality, mainly supporting global leading semiconductor equipment manufacturers; domestic local enterprises, relying on cost advantages, localized

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services and flexible customization capabilities, have gradually broken through core technical bottlenecks, accelerated import substitution, dominated the mid-to-low-end market, and gradually penetrated into the high-end market. In the future, with the continuous breakthrough of semiconductor technology, the continuous expansion of emerging semiconductor fields, and the continuous advancement of localization substitution, the market demand for products in this field will maintain stable growth, and the industry as a whole has good development prospects and broad growth space.

LPI (LP Information)' newest research report, the ?Vacuum Components and Subsystems for Semiconductor Equipment Industry Forecast? looks at past sales and reviews total world Vacuum Components and Subsystems for Semiconductor Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Vacuum Components and Subsystems for Semiconductor Equipment sales for 2026 through 2032. With Vacuum Components and Subsystems 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 Vacuum Components and Subsystems for Semiconductor Equipment industry.

This Insight Report provides a comprehensive analysis of the global Vacuum Components and Subsystems 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 analyses the strategies of leading global companies with a focus on Vacuum Components and Subsystems 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 Vacuum Components and Subsystems for Semiconductor Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Vacuum Components and Subsystems for Semiconductor Equipment 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 Vacuum Components and Subsystems for Semiconductor Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Vacuum Components and Subsystems for Semiconductor Equipment

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market by product type, application, key players and key regions and countries.

Segmentation by Type:

Vacuum Pump

Vacuum Valve

RF Generator

Others

Segmentation by Use:

Vacuum Generation Components

Vacuum Isolation Components

Vacuum Measurement Components

Vacuum Sealing Components

Vacuum Conveyance Components

Vacuum Protection Components

Segmentation by Location:

Process Chamber Side Components

Load Lock Vacuum Components

Transfer Chamber Vacuum Components

Foreline Vacuum Components

Others

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Segmentation by Application:

- Etch Process
- PVD Process
- CVD Process
- Others

This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia

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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 analyzing the company's coverage, product portfolio, its market penetration.

Edwards (United Kingdom)

Pfeiffer Vacuum+Fab Solutions (Germany)

Atlas Copco Vacuum (Sweden)

Leybold (Germany)

EBARA (Japan)

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ULVAC (Japan)

Agilent Vacuum Technologies (United States)

Osaka Vacuum (Japan)

Shimadzu (Japan)

SHI Cryogenics Group (Japan)

MKS Instruments / MKS Inc. (United States)

VAT Group (Switzerland)

CKD (Japan)

SMC (Japan)

Canon Anelva (Japan)

INFICON (Switzerland)

HORIBA (Japan)

Advanced Energy (United States)

Comet Plasma Control Technologies (Switzerland)

TRUMPF H?ttinger (Germany)

KYKY Technology Co., Ltd. (China)

Jung Sung Tech Co.,Ltd. (South Korea)

Shanghai Hanbell Precise Machinery Co., Ltd. (China)

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