

Global Automated Atomic Force Microscopy Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automated Atomic Force Microscopy market size is expected to reach \$ 622 million by 2032, rising at a market growth of 9.4% CAGR during the forecast period (2026-2032).

In 2025, global Automated Atomic Force Microscopy production reached approximately 3,878 Units. The average price is approximately \$80,000. Automated Atomic Force Microscope Systems refer to AFM-based nanoscale measurement instruments that integrate probe scanning, surface interaction detection, automated sample positioning, probe and laser alignment, recipe-driven measurement, automatic scan optimization, batch data acquisition, defect coordinate import, large-sample or wafer stages, automated probe handling, and software-enabled data analysis.

Based on our research, automated AFM systems should be understood as a specialized industrial and metrology-oriented extension of conventional atomic force microscopy rather than a broad synonym for all AFM instruments. The core market boundary is defined by automation depth: automated sample navigation, probe alignment, laser and detector adjustment, recipe-based scanning, batch measurement, wafer or large-sample stages, automated probe handling, defect-coordinate import, and software-driven data processing. This distinction is important because many AFM manufacturers are real OEMs, but only a subset can be regarded as automated AFM system suppliers under a narrow market-sizing scope. For this reason, the global longlist is intentionally broader than the core formal list: research AFM, UHV SPM, cryogenic AFM and correlative AFM suppliers remain relevant, while pure distributors, probe suppliers and obsolete product lines are excluded from the revenue model.

From a supply-side perspective, the competitive structure is divided between a

concentrated semiconductor metrology segment and a fragmented long-tail of research, specialty and correlative AFM vendors. Bruker, Park Systems, Nearfield Instruments, Semilab and Nanosurf are the most visible suppliers in wafer-level or semiconductor-oriented automated AFM, with different product architectures ranging from fab-ready AFM metrology to high-throughput multi-head systems and 300 mm wafer platforms. Hitachi High-Tech and HORIBA represent strong Japanese capabilities in automated SPM and correlative AFM platforms, while Oxford Instruments/Asylum Research, NenoVision, attocube, Scienta Omicron, UNISOKU, RIBM and other specialty vendors address high-end research, low-temperature, high-speed, AFM-in-SEM and materials-characterization use cases. China is still an emerging supply base, but Nanjing Aimey, Truth Instruments, Biaodu Quantum and Benyuan Nano indicate that local equipment companies are moving from research AFM toward semiconductor-grade and intelligent AFM systems.

Demand growth is increasingly linked to advanced semiconductor manufacturing, advanced packaging and high-value materials characterization. EUV process control, 3D NAND, DRAM and HBM, hybrid bonding, CMP monitoring, power semiconductors, compound semiconductor wafers and defect review all create use cases where nanometer-scale 3D topography and localized surface information matter. Automated AFM will not replace high-throughput optical metrology, CD-SEM, OCD, ellipsometry or X-ray tools across the entire process flow; its role is more likely to be that of a precision node within hybrid metrology. This gives the market attractive growth potential but also imposes a ceiling on penetration because throughput, measurement area and process integration remain critical constraints.

From a technology roadmap standpoint, the industry is moving in three directions. The first is higher-throughput wafer AFM, enabled by miniaturized scan heads, multi-head architectures, automated wafer handling and defect-coordinate workflows. The second is intelligent and user-friendly AFM, where automated setup, scan optimization and AI-assisted analysis reduce operator dependence. The third is correlative and application-specific AFM, including AFM-Raman, AFM-IR, PiFM, AFM-in-SEM, cryogenic AFM and high-speed bio-AFM. Policy-driven semiconductor localization, rising fab capital expenditure, new product launches and regional supply-chain diversification will support demand, but actual adoption will depend on tool reliability, service capability, recipe ecosystem, data compatibility and proven value in production environments.

This report studies the global Automated Atomic Force Microscopy production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automated Atomic Force Microscopy and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automated Atomic Force Microscopy that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automated Atomic Force Microscopy total production and demand, 2021-2032, (K Units)

Global Automated Atomic Force Microscopy total production value, 2021-2032, (USD Million)

Global Automated Atomic Force Microscopy production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automated Atomic Force Microscopy consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automated Atomic Force Microscopy domestic production, consumption, key domestic manufacturers and share

Global Automated Atomic Force Microscopy production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automated Atomic Force Microscopy production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automated Atomic Force Microscopy production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automated Atomic Force Microscopy market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bruker Corporation, Park Systems Corp., Nearfield Instruments B.V., Semilab Zrt., Nanosurf AG, Hitachi High-Tech Corporation, DAEIL SYSTEMS, Oxford Instruments plc, HORIBA, Ltd., Molecular Vista, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automated Atomic Force Microscopy market

Detailed Segmentation:

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

Global Automated Atomic Force Microscopy Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automated Atomic Force Microscopy Market, Segmentation by Type:

Fully Automated AFM

Semi-automated AFM

Global Automated Atomic Force Microscopy Market, Segmentation by Measurement Functions:

Automated AFM for Topography Measurement

Automated AFM for Multi-physics Measurement

Others

Global Automated Atomic Force Microscopy Market, Segmentation by Maximum Sample Size:

Small-Sample Automated AFM: Max Sample Size

Medium-Sample Automated AFM: Max Sample Size 100–200 mm

Large-Sample Automated AFM: Max Sample Size > 200 mm

Global Automated Atomic Force Microscopy Market, Segmentation by Application:

Semiconductors and Electronics

Materials Science and Nanotechnology

Life Sciences and Biomedicine

Others

Companies Profiled:

Bruker Corporation

Park Systems Corp.

Nearfield Instruments B.V.

Semilab Zrt.

Nanosurf AG

Hitachi High-Tech Corporation

DAEIL SYSTEMS

Oxford Instruments plc

HORIBA, Ltd.

Molecular Vista, Inc.

ICSPI Corp.

Nanjing Aimey Instrument Technology Co., Ltd.

Truth Instruments Co., Ltd.

NenoVision s.r.o.

RIBM Co., Ltd.

attocube systems AG

Key Questions Answered:

1. How big is the global Automated Atomic Force Microscopy market?
2. What is the demand of the global Automated Atomic Force Microscopy market?
3. What is the year over year growth of the global Automated Atomic Force Microscopy market?
4. What is the production and production value of the global Automated Atomic Force Microscopy market?
5. Who are the key producers in the global Automated Atomic Force Microscopy market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Automated Atomic Force Microscopy Demand (2021-2032)
- 2.2 World Automated Atomic Force Microscopy Consumption by Region
 - 2.2.1 World Automated Atomic Force Microscopy Consumption by Region (2021-2026)
 - 2.2.2 World Automated Atomic Force Microscopy Consumption Forecast by Region (2027-2032)
- 2.3 United States Automated Atomic Force Microscopy Consumption (2021-2032)
- 2.4 China Automated Atomic Force Microscopy Consumption (2021-2032)
- 2.5 Europe Automated Atomic Force Microscopy Consumption (2021-2032)
- 2.6 Japan Automated Atomic Force Microscopy Consumption (2021-2032)
- 2.7 South Korea Automated Atomic Force Microscopy Consumption (2021-2032)
- 2.8 ASEAN Automated Atomic Force Microscopy Consumption (2021-2032)

2.9 India Automated Atomic Force Microscopy Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Automated Atomic Force Microscopy Production Value by Manufacturer (2021-2026)

3.2 World Automated Atomic Force Microscopy Production by Manufacturer (2021-2026)

3.3 World Automated Atomic Force Microscopy Average Price by Manufacturer (2021-2026)

3.4 Automated Atomic Force Microscopy Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Automated Atomic Force Microscopy Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Automated Atomic Force Microscopy in 2025

3.5.3 Global Concentration Ratios (CR8) for Automated Atomic Force Microscopy in 2025

3.6 Automated Atomic Force Microscopy Market: Overall Company Footprint Analysis

3.6.1 Automated Atomic Force Microscopy Market: Region Footprint

3.6.2 Automated Atomic Force Microscopy Market: Company Product Type Footprint

3.6.3 Automated Atomic Force Microscopy Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Automated Atomic Force Microscopy Production Value Comparison

4.1.1 United States VS China: Automated Atomic Force Microscopy Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Automated Atomic Force Microscopy Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Automated Atomic Force Microscopy Production

Comparison

4.2.1 United States VS China: Automated Atomic Force Microscopy Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Automated Atomic Force Microscopy Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Automated Atomic Force Microscopy Consumption Comparison

4.3.1 United States VS China: Automated Atomic Force Microscopy Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Automated Atomic Force Microscopy Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Automated Atomic Force Microscopy Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Automated Atomic Force Microscopy Production Value (2021-2026)

4.4.3 United States Based Manufacturers Automated Atomic Force Microscopy Production (2021-2026)

4.5 China Based Automated Atomic Force Microscopy Manufacturers and Market Share

4.5.1 China Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automated Atomic Force Microscopy Production Value (2021-2026)

4.5.3 China Based Manufacturers Automated Atomic Force Microscopy Production (2021-2026)

4.6 Rest of World Based Automated Atomic Force Microscopy Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automated Atomic Force Microscopy Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automated Atomic Force Microscopy Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Automated Atomic Force Microscopy Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Fully Automated AFM

5.2.2 Semi-automated AFM

5.3 Market Segment by Type

5.3.1 World Automated Atomic Force Microscopy Production by Type (2021-2032)

5.3.2 World Automated Atomic Force Microscopy Production Value by Type (2021-2032)

5.3.3 World Automated Atomic Force Microscopy Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY MEASUREMENT FUNCTIONS

6.1 World Automated Atomic Force Microscopy Market Size Overview by Measurement Functions: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Measurement Functions

6.2.1 Automated AFM for Topography Measurement

6.2.2 Automated AFM for Multi-physics Measurement

6.2.3 Others

6.3 Market Segment by Measurement Functions

6.3.1 World Automated Atomic Force Microscopy Production by Measurement Functions (2021-2032)

6.3.2 World Automated Atomic Force Microscopy Production Value by Measurement Functions (2021-2032)

6.3.3 World Automated Atomic Force Microscopy Average Price by Measurement Functions (2021-2032)

7 MARKET ANALYSIS BY MAXIMUM SAMPLE SIZE

7.1 World Automated Atomic Force Microscopy Market Size Overview by Maximum Sample Size: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Maximum Sample Size

7.2.1 Small-Sample Automated AFM: Max Sample Size 100–200 mm

7.2.2 Medium-Sample Automated AFM: Max Sample Size 100–200 mm

7.2.3 Large-Sample Automated AFM: Max Sample Size > 200 mm

7.3 Market Segment by Maximum Sample Size

7.3.1 World Automated Atomic Force Microscopy Production by Maximum Sample Size (2021-2032)

7.3.2 World Automated Atomic Force Microscopy Production Value by Maximum Sample Size (2021-2032)

7.3.3 World Automated Atomic Force Microscopy Average Price by Maximum Sample Size (2021-2032)

Size (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Automated Atomic Force Microscopy Market Size Overview by Application:
2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Semiconductors and Electronics

8.2.2 Materials Science and Nanotechnology

8.2.3 Life Sciences and Biomedicine

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Automated Atomic Force Microscopy Production by Application
(2021-2032)

8.3.2 World Automated Atomic Force Microscopy Production Value by Application
(2021-2032)

8.3.3 World Automated Atomic Force Microscopy Average Price by Application
(2021-2032)

9 COMPANY PROFILES

9.1 Bruker Corporation

9.1.1 Bruker Corporation Details

9.1.2 Bruker Corporation Major Business

9.1.3 Bruker Corporation Automated Atomic Force Microscopy Product and Services

9.1.4 Bruker Corporation Automated Atomic Force Microscopy Production, Price,
Value, Gross Margin and Market Share (2021-2026)

9.1.5 Bruker Corporation Recent Developments/Updates

9.1.6 Bruker Corporation Competitive Strengths & Weaknesses

9.2 Park Systems Corp.

9.2.1 Park Systems Corp. Details

9.2.2 Park Systems Corp. Major Business

9.2.3 Park Systems Corp. Automated Atomic Force Microscopy Product and Services

9.2.4 Park Systems Corp. Automated Atomic Force Microscopy Production, Price,
Value, Gross Margin and Market Share (2021-2026)

9.2.5 Park Systems Corp. Recent Developments/Updates

9.2.6 Park Systems Corp. Competitive Strengths & Weaknesses

9.3 Nearfield Instruments B.V.

9.3.1 Nearfield Instruments B.V. Details

- 9.3.2 Nearfield Instruments B.V. Major Business
- 9.3.3 Nearfield Instruments B.V. Automated Atomic Force Microscopy Product and Services
- 9.3.4 Nearfield Instruments B.V. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.3.5 Nearfield Instruments B.V. Recent Developments/Updates
- 9.3.6 Nearfield Instruments B.V. Competitive Strengths & Weaknesses
- 9.4 Semilab Zrt.
- 9.4.1 Semilab Zrt. Details
- 9.4.2 Semilab Zrt. Major Business
- 9.4.3 Semilab Zrt. Automated Atomic Force Microscopy Product and Services
- 9.4.4 Semilab Zrt. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.4.5 Semilab Zrt. Recent Developments/Updates
- 9.4.6 Semilab Zrt. Competitive Strengths & Weaknesses
- 9.5 Nanosurf AG
- 9.5.1 Nanosurf AG Details
- 9.5.2 Nanosurf AG Major Business
- 9.5.3 Nanosurf AG Automated Atomic Force Microscopy Product and Services
- 9.5.4 Nanosurf AG Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.5.5 Nanosurf AG Recent Developments/Updates
- 9.5.6 Nanosurf AG Competitive Strengths & Weaknesses
- 9.6 Hitachi High-Tech Corporation
- 9.6.1 Hitachi High-Tech Corporation Details
- 9.6.2 Hitachi High-Tech Corporation Major Business
- 9.6.3 Hitachi High-Tech Corporation Automated Atomic Force Microscopy Product and Services
- 9.6.4 Hitachi High-Tech Corporation Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Hitachi High-Tech Corporation Recent Developments/Updates
- 9.6.6 Hitachi High-Tech Corporation Competitive Strengths & Weaknesses
- 9.7 DAEIL SYSTEMS
- 9.7.1 DAEIL SYSTEMS Details
- 9.7.2 DAEIL SYSTEMS Major Business
- 9.7.3 DAEIL SYSTEMS Automated Atomic Force Microscopy Product and Services
- 9.7.4 DAEIL SYSTEMS Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.7.5 DAEIL SYSTEMS Recent Developments/Updates

- 9.7.6 DAEIL SYSTEMS Competitive Strengths & Weaknesses
- 9.8 Oxford Instruments plc
 - 9.8.1 Oxford Instruments plc Details
 - 9.8.2 Oxford Instruments plc Major Business
 - 9.8.3 Oxford Instruments plc Automated Atomic Force Microscopy Product and Services
 - 9.8.4 Oxford Instruments plc Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Oxford Instruments plc Recent Developments/Updates
 - 9.8.6 Oxford Instruments plc Competitive Strengths & Weaknesses
- 9.9 HORIBA, Ltd.
 - 9.9.1 HORIBA, Ltd. Details
 - 9.9.2 HORIBA, Ltd. Major Business
 - 9.9.3 HORIBA, Ltd. Automated Atomic Force Microscopy Product and Services
 - 9.9.4 HORIBA, Ltd. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 HORIBA, Ltd. Recent Developments/Updates
 - 9.9.6 HORIBA, Ltd. Competitive Strengths & Weaknesses
- 9.10 Molecular Vista, Inc.
 - 9.10.1 Molecular Vista, Inc. Details
 - 9.10.2 Molecular Vista, Inc. Major Business
 - 9.10.3 Molecular Vista, Inc. Automated Atomic Force Microscopy Product and Services
 - 9.10.4 Molecular Vista, Inc. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Molecular Vista, Inc. Recent Developments/Updates
 - 9.10.6 Molecular Vista, Inc. Competitive Strengths & Weaknesses
- 9.11 ICSPi Corp.
 - 9.11.1 ICSPi Corp. Details
 - 9.11.2 ICSPi Corp. Major Business
 - 9.11.3 ICSPi Corp. Automated Atomic Force Microscopy Product and Services
 - 9.11.4 ICSPi Corp. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 ICSPi Corp. Recent Developments/Updates
 - 9.11.6 ICSPi Corp. Competitive Strengths & Weaknesses
- 9.12 Nanjing Aimey Instrument Technology Co., Ltd.
 - 9.12.1 Nanjing Aimey Instrument Technology Co., Ltd. Details
 - 9.12.2 Nanjing Aimey Instrument Technology Co., Ltd. Major Business
 - 9.12.3 Nanjing Aimey Instrument Technology Co., Ltd. Automated Atomic Force

Microscopy Product and Services

9.12.4 Nanjing Aimey Instrument Technology Co., Ltd. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Nanjing Aimey Instrument Technology Co., Ltd. Recent Developments/Updates

9.12.6 Nanjing Aimey Instrument Technology Co., Ltd. Competitive Strengths & Weaknesses

9.13 Truth Instruments Co., Ltd.

9.13.1 Truth Instruments Co., Ltd. Details

9.13.2 Truth Instruments Co., Ltd. Major Business

9.13.3 Truth Instruments Co., Ltd. Automated Atomic Force Microscopy Product and Services

9.13.4 Truth Instruments Co., Ltd. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Truth Instruments Co., Ltd. Recent Developments/Updates

9.13.6 Truth Instruments Co., Ltd. Competitive Strengths & Weaknesses

9.14 NenoVision s.r.o.

9.14.1 NenoVision s.r.o. Details

9.14.2 NenoVision s.r.o. Major Business

9.14.3 NenoVision s.r.o. Automated Atomic Force Microscopy Product and Services

9.14.4 NenoVision s.r.o. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 NenoVision s.r.o. Recent Developments/Updates

9.14.6 NenoVision s.r.o. Competitive Strengths & Weaknesses

9.15 RIBM Co., Ltd.

9.15.1 RIBM Co., Ltd. Details

9.15.2 RIBM Co., Ltd. Major Business

9.15.3 RIBM Co., Ltd. Automated Atomic Force Microscopy Product and Services

9.15.4 RIBM Co., Ltd. Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 RIBM Co., Ltd. Recent Developments/Updates

9.15.6 RIBM Co., Ltd. Competitive Strengths & Weaknesses

9.16 attocube systems AG

9.16.1 attocube systems AG Details

9.16.2 attocube systems AG Major Business

9.16.3 attocube systems AG Automated Atomic Force Microscopy Product and Services

9.16.4 attocube systems AG Automated Atomic Force Microscopy Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 attocube systems AG Recent Developments/Updates

9.16.6 attocube systems AG Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Automated Atomic Force Microscopy Industry Chain

10.2 Automated Atomic Force Microscopy Upstream Analysis

10.2.1 Automated Atomic Force Microscopy Core Raw Materials

10.2.2 Main Manufacturers of Automated Atomic Force Microscopy Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Automated Atomic Force Microscopy Production Mode

10.6 Automated Atomic Force Microscopy Procurement Model

10.7 Automated Atomic Force Microscopy Industry Sales Model and Sales Channels

10.7.1 Automated Atomic Force Microscopy Sales Model

10.7.2 Automated Atomic Force Microscopy Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Automated Atomic Force Microscopy Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automated Atomic Force Microscopy Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automated Atomic Force Microscopy Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automated Atomic Force Microscopy Production Value Market Share by Region (2021-2026)

Table 5. World Automated Atomic Force Microscopy Production Value Market Share by Region (2027-2032)

Table 6. World Automated Atomic Force Microscopy Production by Region (2021-2026) & (K Units)

Table 7. World Automated Atomic Force Microscopy Production by Region (2027-2032) & (K Units)

Table 8. World Automated Atomic Force Microscopy Production Market Share by Region (2021-2026)

Table 9. World Automated Atomic Force Microscopy Production Market Share by Region (2027-2032)

Table 10. World Automated Atomic Force Microscopy Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Automated Atomic Force Microscopy Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Automated Atomic Force Microscopy Major Market Trends

Table 13. World Automated Atomic Force Microscopy Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Automated Atomic Force Microscopy Consumption by Region (2021-2026) & (K Units)

Table 15. World Automated Atomic Force Microscopy Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Automated Atomic Force Microscopy Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automated Atomic Force Microscopy Producers in 2025

Table 18. World Automated Atomic Force Microscopy Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Automated Atomic Force Microscopy Producers in 2025

Table 20. World Automated Atomic Force Microscopy Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Automated Atomic Force Microscopy Company Evaluation Quadrant

Table 22. World Automated Atomic Force Microscopy Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automated Atomic Force Microscopy Production Site of Key Manufacturer

Table 24. Automated Atomic Force Microscopy Market: Company Product Type Footprint

Table 25. Automated Atomic Force Microscopy Market: Company Product Application Footprint

Table 26. Automated Atomic Force Microscopy Competitive Factors

Table 27. Automated Atomic Force Microscopy New Entrant and Capacity Expansion Plans

Table 28. Automated Atomic Force Microscopy Mergers & Acquisitions Activity

Table 29. United States VS China Automated Atomic Force Microscopy Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automated Atomic Force Microscopy Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Automated Atomic Force Microscopy Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automated Atomic Force Microscopy Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automated Atomic Force Microscopy Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automated Atomic Force Microscopy Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Automated Atomic Force Microscopy Production Market Share (2021-2026)

Table 37. China Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automated Atomic Force Microscopy Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automated Atomic Force Microscopy Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automated Atomic Force Microscopy Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Automated Atomic Force Microscopy Production Market Share (2021-2026)

Table 42. Rest of World Based Automated Atomic Force Microscopy Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automated Atomic Force Microscopy Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automated Atomic Force Microscopy Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automated Atomic Force Microscopy Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Automated Atomic Force Microscopy Production Market Share (2021-2026)

Table 47. World Automated Atomic Force Microscopy Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Automated Atomic Force Microscopy Production by Type (2021-2026) & (K Units)

Table 49. World Automated Atomic Force Microscopy Production by Type (2027-2032) & (K Units)

Table 50. World Automated Atomic Force Microscopy Production Value by Type (2021-2026) & (USD Million)

Table 51. World Automated Atomic Force Microscopy Production Value by Type (2027-2032) & (USD Million)

Table 52. World Automated Atomic Force Microscopy Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Automated Atomic Force Microscopy Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Automated Atomic Force Microscopy Production Value by Measurement Functions, (USD Million), 2021 & 2025 & 2032

Table 55. World Automated Atomic Force Microscopy Production by Measurement Functions (2021-2026) & (K Units)

Table 56. World Automated Atomic Force Microscopy Production by Measurement Functions (2027-2032) & (K Units)

Table 57. World Automated Atomic Force Microscopy Production Value by Measurement Functions (2021-2026) & (USD Million)

Table 58. World Automated Atomic Force Microscopy Production Value by Measurement Functions (2027-2032) & (USD Million)

Table 59. World Automated Atomic Force Microscopy Average Price by Measurement

Functions (2021-2026) & (US\$/Unit)

Table 60. World Automated Atomic Force Microscopy Average Price by Measurement Functions (2027-2032) & (US\$/Unit)

Table 61. World Automated Atomic Force Microscopy Production Value by Maximum Sample Size, (USD Million), 2021 & 2025 & 2032

Table 62. World Automated Atomic Force Microscopy Production by Maximum Sample Size (2021-2026) & (K Units)

Table 63. World Automated Atomic Force Microscopy Production by Maximum Sample Size (2027-2032) & (K Units)

Table 64. World Automated Atomic Force Microscopy Production Value by Maximum Sample Size (2021-2026) & (USD Million)

Table 65. World Automated Atomic Force Microscopy Production Value by Maximum Sample Size (2027-2032) & (USD Million)

Table 66. World Automated Atomic Force Microscopy Average Price by Maximum Sample Size (2021-2026) & (US\$/Unit)

Table 67. World Automated Atomic Force Microscopy Average Price by Maximum Sample Size (2027-2032) & (US\$/Unit)

Table 68. World Automated Atomic Force Microscopy Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Automated Atomic Force Microscopy Production by Application (2021-2026) & (K Units)

Table 70. World Automated Atomic Force Microscopy Production by Application (2027-2032) & (K Units)

Table 71. World Automated Atomic Force Microscopy Production Value by Application (2021-2026) & (USD Million)

Table 72. World Automated Atomic Force Microscopy Production Value by Application (2027-2032) & (USD Million)

Table 73. World Automated Atomic Force Microscopy Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Automated Atomic Force Microscopy Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Bruker Corporation Basic Information, Manufacturing Base and Competitors

Table 76. Bruker Corporation Major Business

Table 77. Bruker Corporation Automated Atomic Force Microscopy Product and Services

Table 78. Bruker Corporation Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Bruker Corporation Recent Developments/Updates

- Table 80. Bruker Corporation Competitive Strengths & Weaknesses
- Table 81. Park Systems Corp. Basic Information, Manufacturing Base and Competitors
- Table 82. Park Systems Corp. Major Business
- Table 83. Park Systems Corp. Automated Atomic Force Microscopy Product and Services
- Table 84. Park Systems Corp. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Park Systems Corp. Recent Developments/Updates
- Table 86. Park Systems Corp. Competitive Strengths & Weaknesses
- Table 87. Nearfield Instruments B.V. Basic Information, Manufacturing Base and Competitors
- Table 88. Nearfield Instruments B.V. Major Business
- Table 89. Nearfield Instruments B.V. Automated Atomic Force Microscopy Product and Services
- Table 90. Nearfield Instruments B.V. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Nearfield Instruments B.V. Recent Developments/Updates
- Table 92. Nearfield Instruments B.V. Competitive Strengths & Weaknesses
- Table 93. Semilab Zrt. Basic Information, Manufacturing Base and Competitors
- Table 94. Semilab Zrt. Major Business
- Table 95. Semilab Zrt. Automated Atomic Force Microscopy Product and Services
- Table 96. Semilab Zrt. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Semilab Zrt. Recent Developments/Updates
- Table 98. Semilab Zrt. Competitive Strengths & Weaknesses
- Table 99. Nanosurf AG Basic Information, Manufacturing Base and Competitors
- Table 100. Nanosurf AG Major Business
- Table 101. Nanosurf AG Automated Atomic Force Microscopy Product and Services
- Table 102. Nanosurf AG Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Nanosurf AG Recent Developments/Updates
- Table 104. Nanosurf AG Competitive Strengths & Weaknesses
- Table 105. Hitachi High-Tech Corporation Basic Information, Manufacturing Base and Competitors
- Table 106. Hitachi High-Tech Corporation Major Business

Table 107. Hitachi High-Tech Corporation Automated Atomic Force Microscopy Product and Services

Table 108. Hitachi High-Tech Corporation Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Hitachi High-Tech Corporation Recent Developments/Updates

Table 110. Hitachi High-Tech Corporation Competitive Strengths & Weaknesses

Table 111. DAEIL SYSTEMS Basic Information, Manufacturing Base and Competitors

Table 112. DAEIL SYSTEMS Major Business

Table 113. DAEIL SYSTEMS Automated Atomic Force Microscopy Product and Services

Table 114. DAEIL SYSTEMS Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. DAEIL SYSTEMS Recent Developments/Updates

Table 116. DAEIL SYSTEMS Competitive Strengths & Weaknesses

Table 117. Oxford Instruments plc Basic Information, Manufacturing Base and Competitors

Table 118. Oxford Instruments plc Major Business

Table 119. Oxford Instruments plc Automated Atomic Force Microscopy Product and Services

Table 120. Oxford Instruments plc Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Oxford Instruments plc Recent Developments/Updates

Table 122. Oxford Instruments plc Competitive Strengths & Weaknesses

Table 123. HORIBA, Ltd. Basic Information, Manufacturing Base and Competitors

Table 124. HORIBA, Ltd. Major Business

Table 125. HORIBA, Ltd. Automated Atomic Force Microscopy Product and Services

Table 126. HORIBA, Ltd. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. HORIBA, Ltd. Recent Developments/Updates

Table 128. HORIBA, Ltd. Competitive Strengths & Weaknesses

Table 129. Molecular Vista, Inc. Basic Information, Manufacturing Base and Competitors

Table 130. Molecular Vista, Inc. Major Business

Table 131. Molecular Vista, Inc. Automated Atomic Force Microscopy Product and Services

Table 132. Molecular Vista, Inc. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Molecular Vista, Inc. Recent Developments/Updates

Table 134. Molecular Vista, Inc. Competitive Strengths & Weaknesses

Table 135. ICSPi Corp. Basic Information, Manufacturing Base and Competitors

Table 136. ICSPi Corp. Major Business

Table 137. ICSPi Corp. Automated Atomic Force Microscopy Product and Services

Table 138. ICSPi Corp. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. ICSPi Corp. Recent Developments/Updates

Table 140. ICSPi Corp. Competitive Strengths & Weaknesses

Table 141. Nanjing Aimey Instrument Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Nanjing Aimey Instrument Technology Co., Ltd. Major Business

Table 143. Nanjing Aimey Instrument Technology Co., Ltd. Automated Atomic Force Microscopy Product and Services

Table 144. Nanjing Aimey Instrument Technology Co., Ltd. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Nanjing Aimey Instrument Technology Co., Ltd. Recent Developments/Updates

Table 146. Nanjing Aimey Instrument Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 147. Truth Instruments Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. Truth Instruments Co., Ltd. Major Business

Table 149. Truth Instruments Co., Ltd. Automated Atomic Force Microscopy Product and Services

Table 150. Truth Instruments Co., Ltd. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Truth Instruments Co., Ltd. Recent Developments/Updates

Table 152. Truth Instruments Co., Ltd. Competitive Strengths & Weaknesses

Table 153. NenoVision s.r.o. Basic Information, Manufacturing Base and Competitors

Table 154. NenoVision s.r.o. Major Business

Table 155. NenoVision s.r.o. Automated Atomic Force Microscopy Product and Services

Table 156. NenoVision s.r.o. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. NenoVision s.r.o. Recent Developments/Updates

Table 158. NenoVision s.r.o. Competitive Strengths & Weaknesses

Table 159. RIBM Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. RIBM Co., Ltd. Major Business

Table 161. RIBM Co., Ltd. Automated Atomic Force Microscopy Product and Services

Table 162. RIBM Co., Ltd. Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. RIBM Co., Ltd. Recent Developments/Updates

Table 164. RIBM Co., Ltd. Competitive Strengths & Weaknesses

Table 165. attocube systems AG Basic Information, Manufacturing Base and Competitors

Table 166. attocube systems AG Major Business

Table 167. attocube systems AG Automated Atomic Force Microscopy Product and Services

Table 168. attocube systems AG Automated Atomic Force Microscopy Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. attocube systems AG Recent Developments/Updates

Table 170. attocube systems AG Competitive Strengths & Weaknesses

Table 171. Global Key Players of Automated Atomic Force Microscopy Upstream (Raw Materials)

Table 172. Global Automated Atomic Force Microscopy Typical Customers

Table 173. Automated Atomic Force Microscopy Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Automated Atomic Force Microscopy Picture
- Figure 2. World Automated Atomic Force Microscopy Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Automated Atomic Force Microscopy Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Automated Atomic Force Microscopy Production (2021-2032) & (K Units)
- Figure 5. World Automated Atomic Force Microscopy Average Price (2021-2032) & (US\$/Unit)
- Figure 6. World Automated Atomic Force Microscopy Production Value Market Share by Region (2021-2032)
- Figure 7. World Automated Atomic Force Microscopy Production Market Share by Region (2021-2032)
- Figure 8. North America Automated Atomic Force Microscopy Production (2021-2032) & (K Units)
- Figure 9. Europe Automated Atomic Force Microscopy Production (2021-2032) & (K Units)
- Figure 10. China Automated Atomic Force Microscopy Production (2021-2032) & (K Units)
- Figure 11. Japan Automated Atomic Force Microscopy Production (2021-2032) & (K Units)
- Figure 12. Automated Atomic Force Microscopy Market Drivers
- Figure 13. Factors Affecting Demand
- Figure 14. World Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)
- Figure 15. World Automated Atomic Force Microscopy Consumption Market Share by Region (2021-2032)
- Figure 16. United States Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)
- Figure 17. China Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)
- Figure 18. Europe Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)
- Figure 19. Japan Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)

Figure 20. South Korea Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)

Figure 22. India Automated Atomic Force Microscopy Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Automated Atomic Force Microscopy by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Automated Atomic Force Microscopy Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Automated Atomic Force Microscopy Markets in 2025

Figure 26. United States VS China: Automated Atomic Force Microscopy Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Automated Atomic Force Microscopy Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automated Atomic Force Microscopy Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Automated Atomic Force Microscopy Production Market Share 2025

Figure 30. China Based Manufacturers Automated Atomic Force Microscopy Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Automated Atomic Force Microscopy Production Market Share 2025

Figure 32. World Automated Atomic Force Microscopy Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Automated Atomic Force Microscopy Production Value Market Share by Type in 2025

Figure 34. Fully Automated AFM

Figure 35. Semi-automated AFM

Figure 36. World Automated Atomic Force Microscopy Production Market Share by Type (2021-2032)

Figure 37. World Automated Atomic Force Microscopy Production Value Market Share by Type (2021-2032)

Figure 38. World Automated Atomic Force Microscopy Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Automated Atomic Force Microscopy Production Value by Measurement Functions, (USD Million), 2021 & 2025 & 2032

Figure 40. World Automated Atomic Force Microscopy Production Value Market Share

by Measurement Functions in 2025

Figure 41. Automated AFM for Topography Measurement

Figure 42. Automated AFM for Multi-physics Measurement

Figure 43. Others

Figure 44. World Automated Atomic Force Microscopy Production Market Share by Measurement Functions (2021-2032)

Figure 45. World Automated Atomic Force Microscopy Production Value Market Share by Measurement Functions (2021-2032)

Figure 46. World Automated Atomic Force Microscopy Average Price by Measurement Functions (2021-2032) & (US\$/Unit)

Figure 47. World Automated Atomic Force Microscopy Production Value by Maximum Sample Size, (USD Million), 2021 & 2025 & 2032

Figure 48. World Automated Atomic Force Microscopy Production Value Market Share by Maximum Sample Size in 2025

Figure 49. Small-Sample Automated AFM: Max Sample Size Figure 50. Medium-Sample Automated AFM: Max Sample Size 100–200 mm

Figure 51. Large-Sample Automated AFM: Max Sample Size > 200 mm

Figure 52. World Automated Atomic Force Microscopy Production Market Share by Maximum Sample Size (2021-2032)

Figure 53. World Automated Atomic Force Microscopy Production Value Market Share by Maximum Sample Size (2021-2032)

Figure 54. World Automated Atomic Force Microscopy Average Price by Maximum Sample Size (2021-2032) & (US\$/Unit)

Figure 55. World Automated Atomic Force Microscopy Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Automated Atomic Force Microscopy Production Value Market Share by Application in 2025

Figure 57. Semiconductors and Electronics

Figure 58. Materials Science and Nanotechnology

Figure 59. Life Sciences and Biomedicine

Figure 60. Others

Figure 61. World Automated Atomic Force Microscopy Production Market Share by Application (2021-2032)

Figure 62. World Automated Atomic Force Microscopy Production Value Market Share by Application (2021-2032)

Figure 63. World Automated Atomic Force Microscopy Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Automated Atomic Force Microscopy Industry Chain

Figure 65. Automated Atomic Force Microscopy Procurement Model

Figure 66. Automated Atomic Force Microscopy Sales Model

Figure 67. Automated Atomic Force Microscopy Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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