

Global CD-SEM Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CD-SEM market size is expected to reach \$ 1530 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

CD-SEM (Critical Dimension Scanning Electron Microscopes) provides the most precise sub-nanometer-scale measurement results. After a scanner transfers patterns?such as lines and spaces?from a photomask onto a photoresist, a CD-SEM is used to measure the critical dimensions of these patterns. These measurements enable continuous calibration of both the scanner and the fabrication process, thereby ensuring the accuracy of the patterns before they are etched into the wafer.

The market value of CD-SEM equipment lies in its irreplaceable role as a closed-loop process control node in advanced semiconductor manufacturing. As wafer fabrication moves from two-dimensional pattern control toward more complex EUV, advanced logic, 3D NAND, SiC/GaN, and other structured processes, the control windows for critical dimensions, hole diameter, linewidth, edge roughness, and pattern deviation continue to narrow. Conventional optical metrology has inherent limitations in resolution and localized structural recognition, making CD-SEM an important tool for post-lithography inspection, pre-etch confirmation, and process feedback correction.

From a competitive landscape perspective, the CD-SEM market remains highly technology-intensive, with long customer qualification cycles. Among international players, Applied Materials and Hitachi High-Tech are the core leaders in electron-beam inspection and metrology equipment; ASML and KLA also cover related electron-beam inspection or metrology products; Advantest and Holon maintain a presence in mask and EUV mask metrology/review applications. In China, companies such as DJEL, Jingce Electronic, Wellrun Microelectronics, Suzhou Siscantech, and Beijing Hengren

have entered the field of electron-beam inspection/metrology equipment or CD-SEM-related product development. Among them, DJEL and Jingce Electronic have relatively clear product directions in wafer-side CD-SEM and DR-SEM.

Future growth in the CD-SEM market will be jointly driven by process complexity, rising yield-management requirements, and the validation progress of domestic substitution. In the short term, high-end advanced process applications will remain dominated by international suppliers such as Applied Materials and Hitachi High-Tech. The key barriers are concentrated in electron-optical system stability, low-damage imaging, autofocus capability, image-processing algorithms, long-term process databases, and mass-production line validation experience.

This report studies the global CD-SEM production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CD-SEM 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 CD-SEM that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CD-SEM total production and demand, 2021-2032, (K Units)

Global CD-SEM total production value, 2021-2032, (USD Million)

Global CD-SEM production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global CD-SEM consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: CD-SEM domestic production, consumption, key domestic manufacturers and share

Global CD-SEM production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global CD-SEM production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global CD-SEM production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global CD-SEM 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 Applied Materials, ADVANTEST, Hitachi High-Tech, Jingce Electronic, ASML, KLA, Holon Co., Ltd, DJEL, Wellrun Microelectronics, Suzhou Siscantech, 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 CD-SEM market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K 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 CD-SEM Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CD-SEM Market, Segmentation by Type:

Mask / EUV Mask CD-SEM

Mature-Process CD-SEM

Advanced Process CD-SEM

Global CD-SEM Market, Segmentation by Application:

Semiconductor

Mask

Companies Profiled:

Applied Materials

ADVANTEST

Hitachi High-Tech

Jingce Electronic

ASML

KLA

Holon Co., Ltd

DJEL

Wellrun Microelectronics

Suzhou Siscantech

Beijing Hengren

Key Questions Answered:

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

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