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Global Darkfield Wafer Defect Inspection Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Darkfield Wafer Defect Inspection Equipment market size was valued at US$ 2634 million in 2025 and is forecast to a readjusted size of US$ 5007 million by 2032 with a CAGR of 8.7% during review period.

From the perspective of wafer defect inspection technologies, brightfield and darkfield are fundamentally different optical illumination and defect signal acquisition methods. For patterned wafer defect inspection, equipment may employ brightfield, darkfield, or combined brightfield and darkfield configurations. Some high-end Automated Optical Inspection (AOI) equipment also incorporates darkfield optical imaging capabilities. Compared with conventional AOI equipment, which primarily relies on white-light or visible-light imaging and image-processing technologies, professional Darkfield Wafer Defect Inspection Equipment generally focuses more heavily on capturing defect-scattering signals using laser or short-wavelength light sources. By combining background suppression, high-speed scanning, and high-sensitivity signal detection, such equipment can rapidly detect smaller defects and therefore plays an important role in wafer manufacturing process control and material quality control.

In terms of application positioning, the principal differences between brightfield and darkfield inspection lie in the trade-offs among detection sensitivity, defect coverage, spatial resolution, scanning speed, and inspection throughput. Brightfield inspection generally provides higher imaging resolution and is more suitable for identifying defects associated with complex patterns, critical structures, and applications requiring high spatial resolution. Darkfield inspection offers advantages in detecting minute particles, surface-scattering anomalies, and defects in process-monitoring applications requiring

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high-throughput scanning. In advanced logic, DRAM, NAND, and high-end silicon wafer manufacturing, brightfield and darkfield inspection are generally complementary rather than interchangeable. The appropriate inspection configuration is selected according to the process layer, defect type, sensitivity requirement, spatial-resolution requirement, and throughput target.

From a product perspective, Darkfield Wafer Defect Inspection Equipment can be divided into two principal categories. The first category is Unpatterned Darkfield Wafer Defect Inspection Equipment, which is primarily used for bare silicon wafers, epitaxial wafers, blanket films, and other unpatterned wafer surfaces. It is designed to detect particles, scratches, pits, haze, surface contamination, and localized topographical anomalies. Representative products include KLA's Surfscan series. The second category is Patterned Darkfield Wafer Defect Inspection Equipment, which primarily uses laser-scattering detection, polarization control, multi-channel signal acquisition, and patterned-background suppression algorithms to identify particles, residues, process anomalies, and certain pattern-related defects on wafers with complex patterned structures. Representative products include KLA's Puma and Voyager series. These two product categories differ significantly in terms of inspection targets, optical architecture, algorithmic complexity, and equipment value. High-end Patterned Darkfield Wafer Defect Inspection Equipment typically requires more sophisticated illumination, scanning, signal-acquisition, and patterned-background suppression systems and therefore generally commands a higher unit price than conventional Unpatterned Darkfield Wafer Defect Inspection Equipment.

In terms of the competitive landscape, KLA has long maintained a dominant position in the global market for professional Darkfield Wafer Defect Inspection Equipment. Hitachi High-Tech, NEXTIN, Applied Materials, Onto Innovation, and UnitySC compete in selected product segments, regional markets, and specialized applications. In Mainland China, domestic manufacturers have accelerated the qualification and adoption of locally produced equipment. Skyverse Technology, Wuhan Jingce Electronic Group, Jiangsu Semiinnovation Technology, Angkun Semiconductor, Hefei Nano Semiconductor, and Nanjing ZhongAn Semiconductor have commercialized, or are currently advancing customer qualification and commercialization of, Unpatterned and Patterned Darkfield Wafer Defect Inspection Equipment. At present, Chinese manufacturers remain primarily focused on unpatterned wafer darkfield inspection and mature-node or specialty-process applications. However, as equipment sensitivity improves and customer qualification capabilities strengthen, domestically produced equipment is gradually expanding into more advanced process nodes and the Patterned Darkfield Wafer Defect Inspection Equipment market.

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The Darkfield Wafer Defect Inspection Equipment market is characterized by high technological barriers, lengthy customer qualification cycles, strong customer stickiness, and a highly concentrated supplier base. Future demand will be driven primarily by the recovery of capital expenditure in advanced logic, DRAM, and NAND manufacturing, the increasing number of wafer-processing steps, more stringent defect-control requirements, higher inspection sampling rates, and greater equipment density per wafer fab. Supported by its extensive installed base, long-standing customer qualification records, proprietary algorithms and defect databases, and global service network, KLA is expected to retain more than 85% of the global market in 2026. Hitachi High-Tech, NEXTIN, Applied Materials, Onto Innovation, and UnitySC mainly provide complementary competition in selected product segments, customer groups, and regional markets.

Growth in Mainland China, excluding Taiwan, is being supported by wafer-fab capacity expansion, supply-chain security requirements, and the localization of semiconductor inspection and metrology equipment. Chinese suppliers are gradually transitioning from customer qualification and limited-volume sales to broader commercial adoption, although commercialization progress varies substantially among companies. The ability to secure repeat orders will depend on detection sensitivity, nuisance-control performance, equipment stability, production throughput, and field-service capabilities rather than price competitiveness alone. Prices for high-end systems are expected to remain supported by performance upgrades and increasing configuration complexity, while price competition in mature applications is likely to intensify as more domestic suppliers enter the market. Industry growth is unlikely to follow a linear path: the market is expected to expand relatively rapidly during 2027–2029, experience slower growth in 2030 as customers digest earlier capital expenditure, and recover during 2031–2032. Over the longer term, rising inspection intensity, increasing market shares for Chinese equipment suppliers, and the expansion of domestic systems into more advanced process applications will be the three principal drivers reshaping the competitive landscape.

Report Scope

This report is a detailed and comprehensive analysis for global Darkfield Wafer Defect Inspection Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as

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well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Darkfield Wafer Defect Inspection Equipment market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Darkfield Wafer Defect Inspection Equipment market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Darkfield Wafer Defect Inspection Equipment market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Darkfield Wafer Defect Inspection Equipment market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (K US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Darkfield Wafer Defect Inspection Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Darkfield Wafer Defect Inspection Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and

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key developments. Key companies covered as a part of this study include KLA Corporation, Applied Materials, Hitachi High-Tech, NEXTIN, Onto Innovation, Merck (UnitySC), YGK CORPORATION, Shenzhen Skyverse Technology, Hefei Nano Semiconductor / SemiX, Wuhan Jingce Electronic Group, etc.

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

Darkfield Wafer Defect Inspection Equipment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Patterned Darkfield Wafer Inspection

Unpatterned Darkfield Wafer Inspection

Market segment by Inspection Targets

Silicon Wafer Defect Inspection

Compound Wafer Defect Inspection

Market segment by Wafer Size

200mm Wafer

300mm Wafer

Others

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Market segment by Application

Front-end Semiconductor Process

Advanced Packaging

Others

Major players covered

KLA Corporation

Applied Materials

Hitachi High-Tech

NEXTIN

Onto Innovation

Merck (UnitySC)

YGK CORPORATION

Shenzhen Skyverse Technology

Hefei Nano Semiconductor / SemiX

Wuhan Jingce Electronic Group

AK Optics

Avant Semiconductor Equipment

Nanjing ZhongAn Semiconductor

MatrixTime

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Jiangsu Xinshi Technology

PureChip Technology

Takano

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Darkfield Wafer Defect Inspection Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Darkfield Wafer Defect Inspection Equipment, with price, sales quantity, revenue, and global market share of Darkfield Wafer Defect Inspection Equipment from 2021 to 2026.

Chapter 3, the Darkfield Wafer Defect Inspection Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Darkfield Wafer Defect Inspection Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Darkfield Wafer Defect Inspection Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Darkfield Wafer Defect Inspection Equipment.

Chapter 14 and 15, to describe Darkfield Wafer Defect Inspection Equipment sales channel, distributors, customers, research findings and conclusion.

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