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Global Darkfield Wafer Defect Inspection Equipment Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GE9B4C1AEC8BEN.html
Date: November 2026
Pages: 149
Price: US$ 4,480.00 (Single User License)
ID: GE9B4C1AEC8BEN

Abstracts

The global Darkfield Wafer Defect Inspection Equipment market size is expected to reach $ 5007 million by 2032, rising at a market growth of 8.7% CAGR during the forecast period (2026-2032).

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 high-throughput scanning. In advanced logic, DRAM, NAND, and high-end silicon wafer manufacturing, brightfield and darkfield inspection are generally complementary rather

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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.

The Darkfield Wafer Defect Inspection Equipment market is characterized by high

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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 studies the global Darkfield Wafer Defect Inspection Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Darkfield Wafer Defect Inspection Equipment and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores

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demand trends and competition, as well as details the characteristics of Darkfield Wafer Defect Inspection Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Darkfield Wafer Defect Inspection Equipment total production and demand, 2021-2032, (Units)

Global Darkfield Wafer Defect Inspection Equipment total production value, 2021-2032, (USD Million)

Global Darkfield Wafer Defect Inspection Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Darkfield Wafer Defect Inspection Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Darkfield Wafer Defect Inspection Equipment domestic production, consumption, key domestic manufacturers and share

Global Darkfield Wafer Defect Inspection Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Darkfield Wafer Defect Inspection Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Darkfield Wafer Defect Inspection Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Darkfield Wafer Defect Inspection Equipment 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 KLA Corporation, Applied Materials, Hitachi High-Tech, NEXTIN, Onto Innovation, Merck (UnitySC), YGK

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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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Darkfield Wafer Defect Inspection Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (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 Darkfield Wafer Defect Inspection Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Darkfield Wafer Defect Inspection Equipment Market, Segmentation by Type:

Patterned Darkfield Wafer Inspection

Unpatterned Darkfield Wafer Inspection

Global Darkfield Wafer Defect Inspection Equipment Market, Segmentation by Inspection Targets:

Silicon Wafer Defect Inspection

Compound Wafer Defect Inspection

Global Darkfield Wafer Defect Inspection Equipment Market, Segmentation by Wafer Size:

200mm Wafer

300mm Wafer

Others

Global Darkfield Wafer Defect Inspection Equipment Market, Segmentation by Application:

Front-end Semiconductor Process

Advanced Packaging

Others

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Companies Profiled:

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

Jiangsu Xinshi Technology

PureChip Technology

Takano

Key Questions Answered

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1. How big is the global Darkfield Wafer Defect Inspection Equipment market?
2. What is the demand of the global Darkfield Wafer Defect Inspection Equipment market?
3. What is the year over year growth of the global Darkfield Wafer Defect Inspection Equipment market?
4. What is the total value of the global Darkfield Wafer Defect Inspection Equipment market?
5. Who are the Major Players in the global Darkfield Wafer Defect Inspection Equipment market?
6. What are the growth factors driving the market demand?

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