

# **Global Defect Review SEM Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032**

<https://marketpublishers.com/r/GDB5EF381D9DEN.html>

Date: June 2026

Pages: 102

Price: US\$ 3,480.00 (Single User License)

ID: GDB5EF381D9DEN

## **Abstracts**

According to our (Global Info Research) latest study, the global Defect Review SEM market size was valued at US\$ 774 million in 2025 and is forecast to a readjusted size of US\$ 1228 million by 2032 with a CAGR of 6.9% during review period.

In 2024, the global Defect Review SEM production will reach 167 units, with an average selling price of 4,266 K USD/Unit.

Defect Review SEM belongs to the category of electron beam inspection equipment. In addition to DR-SEM, electron beam inspection equipment also includes electron beam defect inspection equipment (EBI).

Defect Review SEM SEM equipment is a high-end equipment that integrates the imaging function of traditional scanning electron microscope (SEM) and the automated defect review system. It is widely used in semiconductor wafer manufacturing, photomask inspection, and quality control in the production of high-precision devices. The equipment can perform high-resolution image acquisition and automatic identification of micro defects pre-marked by inspection equipment (such as inspection machines, defect detection systems), and realize the classification, analysis and recording of defect types, sizes, and morphologies. Compared with ordinary SEM, Review SEM usually has functions such as automatic navigation, high-throughput image acquisition, AI defect classification, and linkage with FAB production systems. It is an indispensable key tool for defect source tracing, process optimization, and yield improvement in wafer fabs.

At present, DR-SEM equipment for wafers accounts for the largest proportion,

accounting for 90.7% of the market share in 2024. Among them, the main companies producing DR-SEM equipment for masks are Advantest and Japan's Holon, of which Holon is mainly sold in Japan. The global leading company of DR-SEM equipment for wafers is Applied Materials, which accounted for more than 55% of the market in 2024. As Chinese local front-end measurement and testing equipment manufacturers gradually commercialize mass production, the growth rate of DR-SEM sales will exceed the global growth rate in the future.

From the production side, the core production areas of Review SEM equipment are mainly the United States and Japan, among which the United States is the most important production area, accounting for 66% of the market share in 2024. There are still large differences in the application, technology and product performance of Chinese electron beam detection and measurement equipment companies and international leading companies (such as Applied Materials and Hitachi High-Tech) in the field of advanced processes. However, as the localization process of Chinese local manufacturers accelerates, some Chinese local companies have also gained a certain market share in the electron beam detection and measurement equipment market, such as Shanghai Jingce and Jingce, among which Jingce focuses on CD-SEM equipment. In addition, in recent years, there have been many new entrants from Chinese local enterprises in the field of electron beam inspection and measurement equipment, such as Wellrun Microelectronics (EBI and CD-SEM), Suzhou Siscantech (EBI and CD-SEM), Suzhou Siscantech (CD-SEM), Wuxi Genxinyue Technology Co., Ltd (CD-SEM and DR-SEM), Suzhou AISTech (EBI) and Huayan Xince Semiconductor (Suzhou) Co., Ltd (EBI). However, at present, their scale is relatively small or some are still in the demo stage. With the development of China's semiconductor market in the future, it is expected that the global competition share of Chinese local manufacturers will gradually increase in the next few years, and China will maintain the fastest growth rate. With the advancement of domestic electron beam inspection and measurement equipment technology, the emergence of cost advantages and the strengthening of policy support, it is expected that by 2031, China's electron beam inspection and measurement equipment output share will reach 4.9%.

This report is a detailed and comprehensive analysis for global Defect Review SEM 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 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 Defect Review SEM market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Defect Review SEM 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 Defect Review SEM 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 Defect Review SEM 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 Defect Review SEM

- 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 Defect Review SEM market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Applied Materials, KLA, Hitachi High-Tech, Advantest, Holon Co., Ltd, Shanghai Jingce, DJEL, etc.

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

### Market Segmentation

Defect Review SEM 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 segment by Type

for 5-7nm Process

for 10-16nm Process

for 20-28nm Process

Others

#### Market segment by Application

Wafer

Mask

#### Major players covered

Applied Materials

KLA

Hitachi High-Tech

Advantest

Holon Co., Ltd

Shanghai Jingce

DJEL

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Defect Review SEM product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Defect Review SEM, with price, sales quantity, revenue, and global market share of Defect Review SEM from 2021 to 2026.

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

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

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 Defect Review SEM 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 Defect Review SEM.

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