

Global Electron Beam Metrology & Inspection Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G1470D9AA0B7EN.html>

Date: January 2026

Pages: 119

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

ID: G1470D9AA0B7EN

Abstracts

According to our (Global Info Research) latest study, the global Electron Beam Metrology & Inspection Equipment market size was valued at US\$ 3449 million in 2025 and is forecast to a readjusted size of US\$ 5366 million by 2032 with a CAGR of 6.6% during review period.

Semiconductor Metrology & Inspection Equipment runs through every process of wafer manufacturing, from design verification to process control detection to wafer testing and finished product testing. Metrology & Inspection Equipment plays a vital role in controlling and improving the yield of wafer manufacturing. According to the testing link, semiconductor Metrology & Inspection can be divided into front-end inspection and back-end inspection. Front-end Metrology & Inspection occurs in the wafer preparation and silicon wafer manufacturing process, including the Metrology of various film thicknesses, nanostructure critical dimensions (CD), overlay errors and other dimensional parameters formed in the silicon wafer manufacturing process, and wafer surface defects, to ensure that the yield of the processing line is controlled above the specified level. According to different functions, front-end Metrology & Inspection equipment is divided into Metrology and defect inspection. The former is mainly for film thickness, film stress, critical dimensions, doping concentration, etc., and the latter is mainly used for wafer surface defect inspection, which is one of the keys to process control and yield management in semiconductor manufacturing.

The purpose of defect inspection is to accurately identify, locate and classify key defects (DOI, which refers to any defect type that is considered to have an impact on yield, reliability or performance) on the inspected wafer, thereby helping defect and yield engineers to quickly resolve defect problems, which is of great significance for wafer

fabs to reduce production costs and improve wafer yield.

Electron Beam Metrology & Inspection Equipment plays a vital role in semiconductor manufacturing, and is mainly used for inspection of physical defects and electrical defects of wafers and integrated circuits, as well as the size Metrology of key graphics. These devices use electron beams to scan the wafers to be tested, obtain high-resolution electron beam images, and use different algorithms to analyze information such as defects and key dimensions on the wafers.

Electron Beam Metrology & Inspection Equipment includes three core equipments, each of which realizes precise control in semiconductor manufacturing through differentiated algorithms: DR-SEM performs sampling positioning based on the defect coordinates provided by optical detection, and completes defect authenticity identification and classification verification by collecting high-resolution SEM images; Electron beam wafer defect inspection equipment (EBI) adopts full scanning detection mode, batch acquires SEM images in the specified area according to the preset detection formula, and uses intelligent analysis algorithms to directly identify and classify micron to nanometer physical/potential defects; CD-SEM focuses on precise size control, accurately reaches the preset measurement coordinates through the automatic focus system, and after collecting images of specific areas, uses pixel-level computing technology to achieve nanometer-level measurement of key structural parameters such as line width and aperture, and feeds back the measurement data to the process equipment in real time to form a closed-loop control. The three types of equipment respectively undertake the functions of defect review, comprehensive screening and precise measurement through algorithm optimization, and jointly build a quality assurance system for advanced semiconductor processes.

From the production side, the core production areas of Electron Beam Metrology & Inspection Equipment are mainly the United States, Europe, Japan and China, among which the United States is the main production area, accounting for 46.5% of the market share in 2024. There are still large differences between Chinese Electron Beam Metrology & Inspection Equipment companies and international leading companies (such as Applied Materials and Hitachi High-Tech) in the application, technology, and product performance of advanced support fields. 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 inspection and measurement equipment market, such as Jingce Electronic and DJEL. In addition, in recent years, there have been many new entrants from Chinese local enterprises, such as Wellrun Microelectronics, Suzhou Siscantech, Beijing Hengren, Wuxi Genxinyue Technology

Co., Ltd, Suzhou AISTech, etc. However, at present, their scale is relatively small or some are still in the Demo stage. With the future development of China's semiconductor market, it is expected that the global competitive 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 China's Electron Beam Metrology & Inspection Equipment technology, the emergence of cost advantages and the strengthening of policy support, it is expected that the share will reach 4.9% in 2031.

In the future, as DRAM (high-bandwidth storage) and NAND technologies continue to become investment hotspots, the three-dimensional stacking architecture and performance limits of memory chips will place higher demands on semiconductor front-end Metrology & Inspection equipment. In order to meet the challenges of increased storage unit density and more complex processes, wafer inspection equipment needs to iterate to sub-nanometer precision and simultaneously develop full-dimensional inspection capabilities for defect location, material property analysis, and three-dimensional structure characterization. This technology upgrade that integrates optics, electron beams, and AI algorithms is becoming a key breakthrough direction for memory chip yield control and industry chain autonomy.

This report is a detailed and comprehensive analysis for global Electron Beam Metrology & 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 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 Electron Beam Metrology & Inspection Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Electron Beam Metrology & 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 Electron Beam Metrology & 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 Electron Beam Metrology & 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 Electron Beam Metrology & 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 Electron Beam Metrology & Inspection Equipment 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, Hitachi High-Tech, ASML, KLA, Advantest, Holon Co., Ltd, Wuhan Jingce Electronic Group, DJEL, Wellrun Microelectronics, Suzhou Siscantech, etc.

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

Market Segmentation

Electron Beam Metrology & 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 segment by Type

Electron Beam Metrology Equipment

Electron Beam Inspection Equipment

Market segment by Application

Wafer

Mask

Major players covered

Applied Materials

Hitachi High-Tech

ASML

KLA

Advantest

Holon Co., Ltd

Wuhan Jingce Electronic Group

DJEL

Wellrun Microelectronics

Suzhou Siscantech

Beijing Hengren

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:

Global Electron Beam Metrology & Inspection Equipment Market 2026 by Manufacturers, Regions, Type and Applicat...

Chapter 1, to describe Electron Beam Metrology & Inspection Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Electron Beam Metrology & Inspection Equipment, with price, sales quantity, revenue, and global market share of Electron Beam Metrology & Inspection Equipment from 2021 to 2026.

Chapter 3, the Electron Beam Metrology & Inspection Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Electron Beam Metrology & 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.

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 Electron Beam Metrology & 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 Electron Beam Metrology & Inspection Equipment.

Chapter 14 and 15, to describe Electron Beam Metrology & Inspection Equipment sales channel, distributors, customers, research findings and conclusion.

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