

Global Electron Beam Metrology & Inspection Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Electron Beam Metrology & Inspection Equipment market size is expected to reach \$ 5565 million by 2032, rising at a market growth of 7.1% CAGR during the forecast period (2026-2032).

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 studies the global Electron Beam Metrology & Inspection Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Electron Beam Metrology & Inspection Equipment 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 Electron Beam Metrology & Inspection Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Electron Beam Metrology & Inspection Equipment total production and demand, 2021-2032, (Units)

Global Electron Beam Metrology & Inspection Equipment total production value, 2021-2032, (USD Million)

Global Electron Beam Metrology & Inspection Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Electron Beam Metrology & Inspection Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Electron Beam Metrology & Inspection Equipment domestic production,

consumption, key domestic manufacturers and share

Global Electron Beam Metrology & Inspection Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Electron Beam Metrology & Inspection Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Electron Beam Metrology & Inspection Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Electron Beam Metrology & 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 Applied Materials, Hitachi High-Tech, ASML, KLA, Advantest, Holon Co., Ltd, Jingce Electronic, 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 Electron Beam Metrology & 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 Electron Beam Metrology & Inspection Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Electron Beam Metrology & Inspection Equipment Market, Segmentation by Type:

Electron Beam Metrology Equipment

Electron Beam Inspection Equipment

Global Electron Beam Metrology & Inspection Equipment Market, Segmentation by Equipemnt:

EBI

DR-SEM

CD-SEM

Global Electron Beam Metrology & Inspection Equipment Market, Segmentation by Application:

Wafer

Mask

Companies Profiled:

Applied Materials

Hitachi High-Tech

ASML

KLA

Advantest

Holon Co., Ltd

Jingce Electronic

DJEL

Wellrun Microelectronics

Suzhou Siscantech

Beijing Hengren

Wuxi Genxinyue Technology

Skyverse Technology

Key Questions Answered:

1. How big is the global Electron Beam Metrology & Inspection Equipment market?
2. What is the demand of the global Electron Beam Metrology & Inspection Equipment market?
3. What is the year over year growth of the global Electron Beam Metrology & Inspection Equipment market?
4. What is the production and production value of the global Electron Beam Metrology & Inspection Equipment market?
5. Who are the key producers in the global Electron Beam Metrology & Inspection Equipment market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Electron Beam Metrology & Inspection Equipment Introduction
- 1.2 World Electron Beam Metrology & Inspection Equipment Supply & Forecast
 - 1.2.1 World Electron Beam Metrology & Inspection Equipment Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Electron Beam Metrology & Inspection Equipment Production (2021-2032)
 - 1.2.3 World Electron Beam Metrology & Inspection Equipment Pricing Trends (2021-2032)
- 1.3 World Electron Beam Metrology & Inspection Equipment Production by Region (Based on Production Site)
 - 1.3.1 World Electron Beam Metrology & Inspection Equipment Production Value by Region (2021-2032)
 - 1.3.2 World Electron Beam Metrology & Inspection Equipment Production by Region (2021-2032)
 - 1.3.3 World Electron Beam Metrology & Inspection Equipment Average Price by Region (2021-2032)
 - 1.3.4 USA Electron Beam Metrology & Inspection Equipment Production (2021-2032)
 - 1.3.5 Europe Electron Beam Metrology & Inspection Equipment Production (2021-2032)
 - 1.3.6 China Electron Beam Metrology & Inspection Equipment Production (2021-2032)
 - 1.3.7 Japan Electron Beam Metrology & Inspection Equipment Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Electron Beam Metrology & Inspection Equipment Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Electron Beam Metrology & Inspection Equipment Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Electron Beam Metrology & Inspection Equipment Demand (2021-2032)
- 2.2 World Electron Beam Metrology & Inspection Equipment Consumption by Region
 - 2.2.1 World Electron Beam Metrology & Inspection Equipment Consumption by Region (2021-2026)
 - 2.2.2 World Electron Beam Metrology & Inspection Equipment Consumption Forecast by Region (2027-2032)
- 2.3 United States Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.4 China Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.5 Europe Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.6 Japan Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.7 South Korea Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.8 ASEAN Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

2.9 India Electron Beam Metrology & Inspection Equipment Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Electron Beam Metrology & Inspection Equipment Production Value by Manufacturer (2021-2026)

3.2 World Electron Beam Metrology & Inspection Equipment Production by Manufacturer (2021-2026)

3.3 World Electron Beam Metrology & Inspection Equipment Average Price by Manufacturer (2021-2026)

3.4 Electron Beam Metrology & Inspection Equipment Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Electron Beam Metrology & Inspection Equipment Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Electron Beam Metrology & Inspection Equipment in 2025

3.5.3 Global Concentration Ratios (CR8) for Electron Beam Metrology & Inspection Equipment in 2025

3.6 Electron Beam Metrology & Inspection Equipment Market: Overall Company Footprint Analysis

3.6.1 Electron Beam Metrology & Inspection Equipment Market: Region Footprint

3.6.2 Electron Beam Metrology & Inspection Equipment Market: Company Product Type Footprint

3.6.3 Electron Beam Metrology & Inspection Equipment Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Electron Beam Metrology & Inspection Equipment Production Value Comparison

4.1.1 United States VS China: Electron Beam Metrology & Inspection Equipment Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Electron Beam Metrology & Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Electron Beam Metrology & Inspection Equipment Production Comparison

4.2.1 United States VS China: Electron Beam Metrology & Inspection Equipment Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Electron Beam Metrology & Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Electron Beam Metrology & Inspection Equipment Consumption Comparison

4.3.1 United States VS China: Electron Beam Metrology & Inspection Equipment Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Electron Beam Metrology & Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Electron Beam Metrology & Inspection Equipment Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value (2021-2026)

4.4.3 United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production (2021-2026)

4.5 China Based Electron Beam Metrology & Inspection Equipment Manufacturers and Market Share

4.5.1 China Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value (2021-2026)

4.5.3 China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production (2021-2026)

4.6 Rest of World Based Electron Beam Metrology & Inspection Equipment Manufacturers and Market Share, 2021-2026

- 4.6.1 Rest of World Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)
- 4.6.2 Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value (2021-2026)
- 4.6.3 Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Electron Beam Metrology & Inspection Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Electron Beam Metrology Equipment
 - 5.2.2 Electron Beam Inspection Equipment
- 5.3 Market Segment by Type
 - 5.3.1 World Electron Beam Metrology & Inspection Equipment Production by Type (2021-2032)
 - 5.3.2 World Electron Beam Metrology & Inspection Equipment Production Value by Type (2021-2032)
 - 5.3.3 World Electron Beam Metrology & Inspection Equipment Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY EQUIPEMNT

- 6.1 World Electron Beam Metrology & Inspection Equipment Market Size Overview by Equipemnt: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Equipemnt
 - 6.2.1 EBI
 - 6.2.2 DR-SEM
 - 6.2.3 CD-SEM
- 6.3 Market Segment by Equipemnt
 - 6.3.1 World Electron Beam Metrology & Inspection Equipment Production by Equipemnt (2021-2032)
 - 6.3.2 World Electron Beam Metrology & Inspection Equipment Production Value by Equipemnt (2021-2032)
 - 6.3.3 World Electron Beam Metrology & Inspection Equipment Average Price by Equipemnt (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Electron Beam Metrology & Inspection Equipment Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Wafer

7.2.2 Mask

7.3 Market Segment by Application

7.3.1 World Electron Beam Metrology & Inspection Equipment Production by Application (2021-2032)

7.3.2 World Electron Beam Metrology & Inspection Equipment Production Value by Application (2021-2032)

7.3.3 World Electron Beam Metrology & Inspection Equipment Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 Applied Materials

8.1.1 Applied Materials Details

8.1.2 Applied Materials Major Business

8.1.3 Applied Materials Electron Beam Metrology & Inspection Equipment Product and Services

8.1.4 Applied Materials Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 Applied Materials Recent Developments/Updates

8.1.6 Applied Materials Competitive Strengths & Weaknesses

8.2 Hitachi High-Tech

8.2.1 Hitachi High-Tech Details

8.2.2 Hitachi High-Tech Major Business

8.2.3 Hitachi High-Tech Electron Beam Metrology & Inspection Equipment Product and Services

8.2.4 Hitachi High-Tech Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Hitachi High-Tech Recent Developments/Updates

8.2.6 Hitachi High-Tech Competitive Strengths & Weaknesses

8.3 ASML

8.3.1 ASML Details

8.3.2 ASML Major Business

8.3.3 ASML Electron Beam Metrology & Inspection Equipment Product and Services

8.3.4 ASML Electron Beam Metrology & Inspection Equipment Production, Price,

Value, Gross Margin and Market Share (2021-2026)

8.3.5 ASML Recent Developments/Updates

8.3.6 ASML Competitive Strengths & Weaknesses

8.4 KLA

8.4.1 KLA Details

8.4.2 KLA Major Business

8.4.3 KLA Electron Beam Metrology & Inspection Equipment Product and Services

8.4.4 KLA Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 KLA Recent Developments/Updates

8.4.6 KLA Competitive Strengths & Weaknesses

8.5 Advantest

8.5.1 Advantest Details

8.5.2 Advantest Major Business

8.5.3 Advantest Electron Beam Metrology & Inspection Equipment Product and Services

8.5.4 Advantest Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 Advantest Recent Developments/Updates

8.5.6 Advantest Competitive Strengths & Weaknesses

8.6 Holon Co., Ltd

8.6.1 Holon Co., Ltd Details

8.6.2 Holon Co., Ltd Major Business

8.6.3 Holon Co., Ltd Electron Beam Metrology & Inspection Equipment Product and Services

8.6.4 Holon Co., Ltd Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 Holon Co., Ltd Recent Developments/Updates

8.6.6 Holon Co., Ltd Competitive Strengths & Weaknesses

8.7 Jingce Electronic

8.7.1 Jingce Electronic Details

8.7.2 Jingce Electronic Major Business

8.7.3 Jingce Electronic Electron Beam Metrology & Inspection Equipment Product and Services

8.7.4 Jingce Electronic Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 Jingce Electronic Recent Developments/Updates

8.7.6 Jingce Electronic Competitive Strengths & Weaknesses

8.8 DJEL

- 8.8.1 DJEL Details
- 8.8.2 DJEL Major Business
- 8.8.3 DJEL Electron Beam Metrology & Inspection Equipment Product and Services
- 8.8.4 DJEL Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.8.5 DJEL Recent Developments/Updates
- 8.8.6 DJEL Competitive Strengths & Weaknesses
- 8.9 Wellrun Microelectronics
 - 8.9.1 Wellrun Microelectronics Details
 - 8.9.2 Wellrun Microelectronics Major Business
 - 8.9.3 Wellrun Microelectronics Electron Beam Metrology & Inspection Equipment Product and Services
 - 8.9.4 Wellrun Microelectronics Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.9.5 Wellrun Microelectronics Recent Developments/Updates
 - 8.9.6 Wellrun Microelectronics Competitive Strengths & Weaknesses
- 8.10 Suzhou Siscantech
 - 8.10.1 Suzhou Siscantech Details
 - 8.10.2 Suzhou Siscantech Major Business
 - 8.10.3 Suzhou Siscantech Electron Beam Metrology & Inspection Equipment Product and Services
 - 8.10.4 Suzhou Siscantech Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.10.5 Suzhou Siscantech Recent Developments/Updates
 - 8.10.6 Suzhou Siscantech Competitive Strengths & Weaknesses
- 8.11 Beijing Hengren
 - 8.11.1 Beijing Hengren Details
 - 8.11.2 Beijing Hengren Major Business
 - 8.11.3 Beijing Hengren Electron Beam Metrology & Inspection Equipment Product and Services
 - 8.11.4 Beijing Hengren Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.11.5 Beijing Hengren Recent Developments/Updates
 - 8.11.6 Beijing Hengren Competitive Strengths & Weaknesses
- 8.12 Wuxi Genxinyue Technology
 - 8.12.1 Wuxi Genxinyue Technology Details
 - 8.12.2 Wuxi Genxinyue Technology Major Business
 - 8.12.3 Wuxi Genxinyue Technology Electron Beam Metrology & Inspection Equipment Product and Services

8.12.4 Wuxi Genxinyue Technology Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.12.5 Wuxi Genxinyue Technology Recent Developments/Updates

8.12.6 Wuxi Genxinyue Technology Competitive Strengths & Weaknesses

8.13 Skyverse Technology

8.13.1 Skyverse Technology Details

8.13.2 Skyverse Technology Major Business

8.13.3 Skyverse Technology Electron Beam Metrology & Inspection Equipment Product and Services

8.13.4 Skyverse Technology Electron Beam Metrology & Inspection Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.13.5 Skyverse Technology Recent Developments/Updates

8.13.6 Skyverse Technology Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Electron Beam Metrology & Inspection Equipment Industry Chain

9.2 Electron Beam Metrology & Inspection Equipment Upstream Analysis

9.2.1 Electron Beam Metrology & Inspection Equipment Core Raw Materials

9.2.2 Main Manufacturers of Electron Beam Metrology & Inspection Equipment Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Electron Beam Metrology & Inspection Equipment Production Mode

9.6 Electron Beam Metrology & Inspection Equipment Procurement Model

9.7 Electron Beam Metrology & Inspection Equipment Industry Sales Model and Sales Channels

9.7.1 Electron Beam Metrology & Inspection Equipment Sales Model

9.7.2 Electron Beam Metrology & Inspection Equipment Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Electron Beam Metrology & Inspection Equipment Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Electron Beam Metrology & Inspection Equipment Production Value by Region (2021-2026) & (USD Million)

Table 3. World Electron Beam Metrology & Inspection Equipment Production Value by Region (2027-2032) & (USD Million)

Table 4. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Region (2021-2026)

Table 5. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Region (2027-2032)

Table 6. World Electron Beam Metrology & Inspection Equipment Production by Region (2021-2026) & (Units)

Table 7. World Electron Beam Metrology & Inspection Equipment Production by Region (2027-2032) & (Units)

Table 8. World Electron Beam Metrology & Inspection Equipment Production Market Share by Region (2021-2026)

Table 9. World Electron Beam Metrology & Inspection Equipment Production Market Share by Region (2027-2032)

Table 10. World Electron Beam Metrology & Inspection Equipment Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Electron Beam Metrology & Inspection Equipment Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Electron Beam Metrology & Inspection Equipment Major Market Trends

Table 13. World Electron Beam Metrology & Inspection Equipment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Electron Beam Metrology & Inspection Equipment Consumption by Region (2021-2026) & (Units)

Table 15. World Electron Beam Metrology & Inspection Equipment Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Electron Beam Metrology & Inspection Equipment Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Electron Beam Metrology & Inspection Equipment Producers in 2025

Table 18. World Electron Beam Metrology & Inspection Equipment Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Electron Beam Metrology & Inspection Equipment Producers in 2025

Table 20. World Electron Beam Metrology & Inspection Equipment Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Electron Beam Metrology & Inspection Equipment Company Evaluation Quadrant

Table 22. World Electron Beam Metrology & Inspection Equipment Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Electron Beam Metrology & Inspection Equipment Production Site of Key Manufacturer

Table 24. Electron Beam Metrology & Inspection Equipment Market: Company Product Type Footprint

Table 25. Electron Beam Metrology & Inspection Equipment Market: Company Product Application Footprint

Table 26. Electron Beam Metrology & Inspection Equipment Competitive Factors

Table 27. Electron Beam Metrology & Inspection Equipment New Entrant and Capacity Expansion Plans

Table 28. Electron Beam Metrology & Inspection Equipment Mergers & Acquisitions Activity

Table 29. United States VS China Electron Beam Metrology & Inspection Equipment Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Electron Beam Metrology & Inspection Equipment Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Electron Beam Metrology & Inspection Equipment Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share (2021-2026)

Table 37. China Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share (2021-2026)

Table 42. Rest of World Based Electron Beam Metrology & Inspection Equipment Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share (2021-2026)

Table 47. World Electron Beam Metrology & Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Electron Beam Metrology & Inspection Equipment Production by Type (2021-2026) & (Units)

Table 49. World Electron Beam Metrology & Inspection Equipment Production by Type (2027-2032) & (Units)

Table 50. World Electron Beam Metrology & Inspection Equipment Production Value by Type (2021-2026) & (USD Million)

Table 51. World Electron Beam Metrology & Inspection Equipment Production Value by Type (2027-2032) & (USD Million)

Table 52. World Electron Beam Metrology & Inspection Equipment Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Electron Beam Metrology & Inspection Equipment Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Electron Beam Metrology & Inspection Equipment Production Value by Equipemnt, (USD Million), 2021 & 2025 & 2032

Table 55. World Electron Beam Metrology & Inspection Equipment Production by Equipemnt (2021-2026) & (Units)

Table 56. World Electron Beam Metrology & Inspection Equipment Production by Equipemnt (2027-2032) & (Units)

Table 57. World Electron Beam Metrology & Inspection Equipment Production Value by Equipemnt (2021-2026) & (USD Million)

Table 58. World Electron Beam Metrology & Inspection Equipment Production Value by

Equipemnt (2027-2032) & (USD Million)

Table 59. World Electron Beam Metrology & Inspection Equipment Average Price by Equipemnt (2021-2026) & (K US\$/Unit)

Table 60. World Electron Beam Metrology & Inspection Equipment Average Price by Equipemnt (2027-2032) & (K US\$/Unit)

Table 61. World Electron Beam Metrology & Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Electron Beam Metrology & Inspection Equipment Production by Application (2021-2026) & (Units)

Table 63. World Electron Beam Metrology & Inspection Equipment Production by Application (2027-2032) & (Units)

Table 64. World Electron Beam Metrology & Inspection Equipment Production Value by Application (2021-2026) & (USD Million)

Table 65. World Electron Beam Metrology & Inspection Equipment Production Value by Application (2027-2032) & (USD Million)

Table 66. World Electron Beam Metrology & Inspection Equipment Average Price by Application (2021-2026) & (K US\$/Unit)

Table 67. World Electron Beam Metrology & Inspection Equipment Average Price by Application (2027-2032) & (K US\$/Unit)

Table 68. Applied Materials Basic Information, Manufacturing Base and Competitors

Table 69. Applied Materials Major Business

Table 70. Applied Materials Electron Beam Metrology & Inspection Equipment Product and Services

Table 71. Applied Materials Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Applied Materials Recent Developments/Updates

Table 73. Applied Materials Competitive Strengths & Weaknesses

Table 74. Hitachi High-Tech Basic Information, Manufacturing Base and Competitors

Table 75. Hitachi High-Tech Major Business

Table 76. Hitachi High-Tech Electron Beam Metrology & Inspection Equipment Product and Services

Table 77. Hitachi High-Tech Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Hitachi High-Tech Recent Developments/Updates

Table 79. Hitachi High-Tech Competitive Strengths & Weaknesses

Table 80. ASML Basic Information, Manufacturing Base and Competitors

Table 81. ASML Major Business

Table 82. ASML Electron Beam Metrology & Inspection Equipment Product and Services

Table 83. ASML Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. ASML Recent Developments/Updates

Table 85. ASML Competitive Strengths & Weaknesses

Table 86. KLA Basic Information, Manufacturing Base and Competitors

Table 87. KLA Major Business

Table 88. KLA Electron Beam Metrology & Inspection Equipment Product and Services

Table 89. KLA Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. KLA Recent Developments/Updates

Table 91. KLA Competitive Strengths & Weaknesses

Table 92. Advantest Basic Information, Manufacturing Base and Competitors

Table 93. Advantest Major Business

Table 94. Advantest Electron Beam Metrology & Inspection Equipment Product and Services

Table 95. Advantest Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Advantest Recent Developments/Updates

Table 97. Advantest Competitive Strengths & Weaknesses

Table 98. Holon Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 99. Holon Co., Ltd Major Business

Table 100. Holon Co., Ltd Electron Beam Metrology & Inspection Equipment Product and Services

Table 101. Holon Co., Ltd Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Holon Co., Ltd Recent Developments/Updates

Table 103. Holon Co., Ltd Competitive Strengths & Weaknesses

Table 104. Jingce Electronic Basic Information, Manufacturing Base and Competitors

Table 105. Jingce Electronic Major Business

Table 106. Jingce Electronic Electron Beam Metrology & Inspection Equipment Product and Services

Table 107. Jingce Electronic Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin

and Market Share (2021-2026)

Table 108. Jingce Electronic Recent Developments/Updates

Table 109. Jingce Electronic Competitive Strengths & Weaknesses

Table 110. DJEL Basic Information, Manufacturing Base and Competitors

Table 111. DJEL Major Business

Table 112. DJEL Electron Beam Metrology & Inspection Equipment Product and Services

Table 113. DJEL Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. DJEL Recent Developments/Updates

Table 115. DJEL Competitive Strengths & Weaknesses

Table 116. Wellrun Microelectronics Basic Information, Manufacturing Base and Competitors

Table 117. Wellrun Microelectronics Major Business

Table 118. Wellrun Microelectronics Electron Beam Metrology & Inspection Equipment Product and Services

Table 119. Wellrun Microelectronics Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Wellrun Microelectronics Recent Developments/Updates

Table 121. Wellrun Microelectronics Competitive Strengths & Weaknesses

Table 122. Suzhou Siscantech Basic Information, Manufacturing Base and Competitors

Table 123. Suzhou Siscantech Major Business

Table 124. Suzhou Siscantech Electron Beam Metrology & Inspection Equipment Product and Services

Table 125. Suzhou Siscantech Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Suzhou Siscantech Recent Developments/Updates

Table 127. Suzhou Siscantech Competitive Strengths & Weaknesses

Table 128. Beijing Hengren Basic Information, Manufacturing Base and Competitors

Table 129. Beijing Hengren Major Business

Table 130. Beijing Hengren Electron Beam Metrology & Inspection Equipment Product and Services

Table 131. Beijing Hengren Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Beijing Hengren Recent Developments/Updates

Table 133. Beijing Hengren Competitive Strengths & Weaknesses
Table 134. Wuxi Genxinyue Technology Basic Information, Manufacturing Base and Competitors
Table 135. Wuxi Genxinyue Technology Major Business
Table 136. Wuxi Genxinyue Technology Electron Beam Metrology & Inspection Equipment Product and Services
Table 137. Wuxi Genxinyue Technology Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 138. Wuxi Genxinyue Technology Recent Developments/Updates
Table 139. Wuxi Genxinyue Technology Competitive Strengths & Weaknesses
Table 140. Skyverse Technology Basic Information, Manufacturing Base and Competitors
Table 141. Skyverse Technology Major Business
Table 142. Skyverse Technology Electron Beam Metrology & Inspection Equipment Product and Services
Table 143. Skyverse Technology Electron Beam Metrology & Inspection Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 144. Skyverse Technology Recent Developments/Updates
Table 145. Skyverse Technology Competitive Strengths & Weaknesses
Table 146. Global Key Players of Electron Beam Metrology & Inspection Equipment Upstream (Raw Materials)
Table 147. Global Electron Beam Metrology & Inspection Equipment Typical Customers
Table 148. Electron Beam Metrology & Inspection Equipment Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Electron Beam Metrology & Inspection Equipment Picture

Figure 2. World Electron Beam Metrology & Inspection Equipment Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Electron Beam Metrology & Inspection Equipment Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Electron Beam Metrology & Inspection Equipment Production (2021-2032) & (Units)

Figure 5. World Electron Beam Metrology & Inspection Equipment Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Region (2021-2032)

Figure 7. World Electron Beam Metrology & Inspection Equipment Production Market Share by Region (2021-2032)

Figure 8. USA Electron Beam Metrology & Inspection Equipment Production (2021-2032) & (Units)

Figure 9. Europe Electron Beam Metrology & Inspection Equipment Production (2021-2032) & (Units)

Figure 10. China Electron Beam Metrology & Inspection Equipment Production (2021-2032) & (Units)

Figure 11. Japan Electron Beam Metrology & Inspection Equipment Production (2021-2032) & (Units)

Figure 12. Electron Beam Metrology & Inspection Equipment Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 15. World Electron Beam Metrology & Inspection Equipment Consumption Market Share by Region (2021-2032)

Figure 16. United States Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 17. China Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 18. Europe Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 19. Japan Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 20. South Korea Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 21. ASEAN Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 22. India Electron Beam Metrology & Inspection Equipment Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Electron Beam Metrology & Inspection Equipment by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Electron Beam Metrology & Inspection Equipment Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Electron Beam Metrology & Inspection Equipment Markets in 2025

Figure 26. United States VS China: Electron Beam Metrology & Inspection Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Electron Beam Metrology & Inspection Equipment Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Electron Beam Metrology & Inspection Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share 2025

Figure 30. China Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Electron Beam Metrology & Inspection Equipment Production Market Share 2025

Figure 32. World Electron Beam Metrology & Inspection Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Type in 2025

Figure 34. Electron Beam Metrology Equipment

Figure 35. Electron Beam Inspection Equipment

Figure 36. World Electron Beam Metrology & Inspection Equipment Production Market Share by Type (2021-2032)

Figure 37. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Type (2021-2032)

Figure 38. World Electron Beam Metrology & Inspection Equipment Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 39. World Electron Beam Metrology & Inspection Equipment Production Value by Equipemnt, (USD Million), 2021 & 2025 & 2032

Figure 40. World Electron Beam Metrology & Inspection Equipment Production Value

Market Share by Equipemnt in 2025

Figure 41. EBI

Figure 42. DR-SEM

Figure 43. CD-SEM

Figure 44. World Electron Beam Metrology & Inspection Equipment Production Market Share by Equipemnt (2021-2032)

Figure 45. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Equipemnt (2021-2032)

Figure 46. World Electron Beam Metrology & Inspection Equipment Average Price by Equipemnt (2021-2032) & (K US\$/Unit)

Figure 47. World Electron Beam Metrology & Inspection Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Application in 2025

Figure 49. Wafer

Figure 50. Mask

Figure 51. World Electron Beam Metrology & Inspection Equipment Production Market Share by Application (2021-2032)

Figure 52. World Electron Beam Metrology & Inspection Equipment Production Value Market Share by Application (2021-2032)

Figure 53. World Electron Beam Metrology & Inspection Equipment Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 54. Electron Beam Metrology & Inspection Equipment Industry Chain

Figure 55. Electron Beam Metrology & Inspection Equipment Procurement Model

Figure 56. Electron Beam Metrology & Inspection Equipment Sales Model

Figure 57. Electron Beam Metrology & Inspection Equipment Sales Channels, Direct Sales, and Distribution

Figure 58. Methodology

Figure 59. Research Process and Data Source

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