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Global FIB-SEM for Semiconductor 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 FIB-SEM for Semiconductor market size was valued at US$ 745 million in 2025 and is forecast to a readjusted size of US$ 1904 million by 2032 with a CAGR of 11.8% during review period.

Semiconductor FIB-SEM refers to a focused ion beam–scanning electron microscope specifically configured for the analysis of wafers, semiconductor devices, advanced packages, and semiconductor materials. It integrates a focused ion beam column and a scanning electron microscope column within the same high-vacuum chamber. The SEM is primarily used for region-of-interest navigation, high-resolution surface and cross-sectional imaging, endpoint observation, and compositional or crystallographic analysis, while the FIB performs sputtering, trenching, delayering, cross-section preparation, TEM/STEM lamella thinning, localized deposition, and circuit modification. By aligning the electron and ion beams at, or close to, a common coincidence point, the system creates an integrated locate–mill–image–analyze workflow. Under a narrow market definition, semiconductor FIB-SEM excludes standalone single-beam FIB systems, conventional analytical SEMs, CD-SEMs, defect review SEMs, and e-beam inspection tools; its defining function is localized destructive micro- or nano-machining combined with simultaneous high-resolution structural observation. Commercial platforms such as Thermo Fisher Helios, ZEISS Crossbeam, and TESCAN SOLARIS are designed around site-specific cross-sectioning, TEM specimen preparation, and semiconductor physical failure analysis.

Semiconductor FIB-SEM systems can be divided principally into Ga-LMIS FIB-SEM, xenon plasma FIB-SEM, multi-ion PFIB, and laser-assisted FIB-SEM. Ga-LMIS

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platforms offer small probe sizes, high precision at low beam currents, and mature process recipes and automation, making them the dominant solution for site-specific analysis of advanced logic and memory devices and for ultra-thin TEM lamella preparation. Xenon PFIB provides much higher ion currents and faster bulk material removal, supporting cross-sectioning of TSVs, solder interconnects, HBM packages, chiplets, MEMS structures, SiC power devices, and thick packages. Multi-ion PFIB systems can switch among argon, nitrogen, oxygen, and xenon to optimize sputter behavior across metals, dielectrics, polymers, and compound semiconductors. Laser-assisted systems use a femtosecond laser to rapidly approach a deeply buried target before precision finishing by the ion beam. Product architectures are consequently separating into general-purpose laboratory tools, 300 mm wafer systems, automated TEM preparation workstations, high-current PFIB systems, and advanced-packaging-specific platforms. Thermo Fisher's Helios Hydra supports four ion species, TESCAN SOLARIS X 2 uses a high-current Xe PFIB for deep cross-sectioning and Ga-free lamella preparation, while ZEISS Crossbeam Samplefab and Crossbeam 750 emphasize automated preparation and uninterrupted "see while you mill" control.

The principal applications of semiconductor FIB-SEM are physical failure analysis, site-specific cross-sectioning, TEM/STEM sample preparation, three-dimensional device reconstruction, wafer delayering, circuit editing, process development, and large-area analysis of advanced packages and power devices. TEM/STEM lamella preparation and physical failure analysis remain the largest demand segments, while GAA transistors, backside power delivery, 3D NAND, and advanced DRAM are raising requirements for nanometer-scale targeting, low-damage thinning, and repeatable automated preparation. HBM, TSVs, hybrid bonding, micro-bumps, and thick heterogeneous packages are driving PFIB and laser-assisted systems faster than conventional general-purpose Ga FIB-SEM platforms. The market is shifting from operator-dependent laboratory instrumentation toward automated workflow platforms and, in selected cases, near-line process-support tools. Current systems increasingly incorporate defect-coordinate import, batch recipes, automated lift-out, traceable data management, and unattended operation to reduce the time between defect detection and TEM-based root-cause confirmation.

The global semiconductor FIB-SEM market is relatively concentrated. Thermo Fisher Scientific, building on FEI's installed base and intellectual property, leads with a broad portfolio spanning Ga DualBeam, Xe PFIB, multi-ion PFIB, and full-wafer platforms. ZEISS competes through Crossbeam, Samplefab, and LaserFIB solutions, with strengths in automated TEM preparation and correlated microscopy. Hitachi High-Tech is differentiated by orthogonal beam geometries, real-time cross-section observation,

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and semiconductor analysis capabilities, while JEOL benefits from integration with TEM workflows and automated specimen preparation. TESCAN has expanded through parallel Ga and Xe product lines, advanced-packaging applications, and competitively positioned platforms. Raith is concentrated in ion-beam nanofabrication and R&D applications, while Chinese suppliers such as CIQTEK and Shanghai Precision Measurement are entering through research laboratories, mature-node semiconductor applications, and selected failure-analysis workflows. Technology supply is centered in the United States, Germany, Japan, the Czech Republic, and China, whereas demand is concentrated in mainland China, Taiwan, South Korea, Japan, the United States, and Europe. SEMI expects global 300 mm fab-equipment investment to maintain double-digit growth in 2026 and 2027, while China is projected to retain the world's largest installed wafer-capacity base, keeping East Asia at the center of incremental FIB-SEM demand.

Semiconductor FIB-SEM will continue to evolve toward higher automation, lower sample damage, larger-volume material removal, full-wafer compatibility, multimodal characterization, and software intelligence. Ga-LMIS will not be fully displaced by plasma FIB; instead, the industry is moving toward hierarchical workflows in which lasers provide rapid bulk access, PFIB performs high-volume removal, and Ga FIB completes precision finishing. Automated TEM preparation will progress from automated individual steps to unattended bulk-to-grid workflows, while machine learning will increasingly support target recognition, beam tuning, endpoint detection, drift correction, and lamella quality assessment. Demand is being driven by AI and high-performance computing investments in advanced logic and HBM, increasing 3D NAND layer counts, GAA and backside-power architectures, chiplets and hybrid bonding, power and compound semiconductor growth, and the localization of semiconductor manufacturing capacity. SEMI's latest outlook indicates that AI-related demand is pushing front-end, test, assembly, and advanced-packaging equipment investment to new records. As a critical tool for yield learning, failure analysis, and advanced sample preparation, semiconductor FIB-SEM should outgrow conventional research electron microscopy, although high acquisition costs, beam-induced damage, recipe-transfer limitations, shortages of experienced operators, and lengthy semiconductor customer qualification cycles will continue to constrain adoption.

Report Scope

This report is a detailed and comprehensive analysis for global FIB-SEM for Semiconductor market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Primary Ion Source Technology and by

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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 FIB-SEM for Semiconductor market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global FIB-SEM for Semiconductor market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global FIB-SEM for Semiconductor market size and forecasts, by Primary Ion Source Technology and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global FIB-SEM for Semiconductor market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (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 FIB-SEM for Semiconductor

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 FIB-SEM for Semiconductor 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 Hitachi High-Tech, Thermo Fisher Scientific (FEI), Carl Zeiss Microscopy GmbH, JEOL, TESCAN, Raith, Applied Materials, CIQTEK, Shanghai Precision Measurement Semiconductor Technology, etc.

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

Market Segmentation

FIB-SEM for Semiconductor market is split by Primary Ion Source Technology and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Primary Ion Source Technology, 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 Primary Ion Source Technology

Ga-LMIS FIB-SEM

Plasma FIB-SEM

Laser-assisted FIB-SEM

Multi-Ion LMAIS FIB-SEM

Market segment by Sample and Wafer Handling Format

Logic and Foundry

Memory

Advanced Packaging and Heterogeneous Integration

Power and Compound Semiconductor

CIS, MEMS and Optoelectronics

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Mature-Node and Specialty Process

Semiconductor Equipment, Materials and R&D

Market segment by Target Application

300 mm Full-Wafer FIB-SEM

150/200 mm Wafer-Compatible FIB-SEM

Package and Large-Specimen FIB-SEM

Die and Wafer-Coupon FIB-SEM

Small-Specimen and Standard-Stub FIB-SEM

Market segment by Application

TEM/STEM Sample Preparation

PFA / Site-specific Cross-section

3D Structural Characterization / Process Development

Large Cross-Section for Advanced Packaging & Power Devices

Circuit Editing / Nanofabrication & Others

Major players covered

Hitachi High-Tech

Thermo Fisher Scientific (FEI)

Carl Zeiss Microscopy GmbH

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JEOL

TESCAN

Raith

Applied Materials

CIQTEK

Shanghai Precision Measurement Semiconductor Technology

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 FIB-SEM for Semiconductor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of FIB-SEM for Semiconductor, with price, sales quantity, revenue, and global market share of FIB-SEM for Semiconductor from 2021 to 2026.

Chapter 3, the FIB-SEM for Semiconductor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by

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landscape contrast.

Chapter 4, the FIB-SEM for Semiconductor 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 Primary Ion Source Technology and by Application, with sales market share and growth rate by Primary Ion Source Technology, 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 FIB-SEM for Semiconductor market forecast, by regions, by Primary Ion Source Technology, 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 FIB-SEM for Semiconductor.

Chapter 14 and 15, to describe FIB-SEM for Semiconductor sales channel, distributors, customers, research findings and conclusion.

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