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Global Focused Ion Beam Technology Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Focused Ion Beam Technology market size is expected to reach $ 1891 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

Focused ion beam technology (FIB) is an advanced nano-processing method. It generates ion beams through a liquid metal ion source (such as gallium, Ga), accelerates and focuses the ion gun, and acts on the sample surface. It uses physical collision to achieve processing purposes such as cutting, etching, deposition, and ion implantation. Focused ion beam technology can achieve nano-level processing accuracy. The current commercial model has a maximum image resolution of 4nm, which makes it have extremely high application value in the fields of microelectronics, nanomaterials, etc.

This report only counts companies that provide focused ion beam technology services.

Key Findings

Gallium liquid metal ion sources and gaseous plasma ion sources constitute the two core ion-source routes

?5nm minimum beam capability supports the highest-precision processing and site-specific sample preparation requirements

FIB-SEM integrates nanoscale milling with high-resolution electron imaging for cross-sectioning tomography and specimen preparation

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FIB-SIMS extends Focused Ion Beam Technology toward high-sensitivity elemental isotopic and three-dimensional chemical analysis

Semiconductor OLED new energy and advanced materials constitute the principal industrial and research application directions

Market Trends

Focused Ion Beam Technology is evolving simultaneously toward higher precision, higher material-removal throughput, richer analytical integration and greater workflow automation. Ga FIB continues to serve precision-sensitive workflows because mature liquid-metal ion sources provide fine probe performance and controlled low-current milling, while plasma FIB is expanding applications requiring larger cross-sections, deeper access and higher-volume three-dimensional analysis. Current multi-ion plasma architectures further allow the ion species to be selected according to material response, improving flexibility for semiconductor, battery and advanced-material specimens. Composite systems are also moving beyond conventional FIB-SEM imaging toward multimodal platforms integrating EDS, EBSD, SIMS and automated three-dimensional reconstruction. Another important direction is workflow automation: recipe-based lamella preparation, automatic alignment, endpoint control and unattended serial sectioning are reducing operator dependence and improving reproducibility. In 2026, new FIB-SEM product development continued to emphasize real-time imaging during milling, automated TEM lamella preparation and consistent high-accuracy processing, indicating that productivity and process repeatability are becoming as important as ultimate resolution.

Market Dynamics

Drivers

The strongest demand driver is the increasing structural complexity of semiconductor devices and advanced materials, where defects, interfaces and buried features increasingly need to be located and analyzed at nanometer dimensions. Focused Ion Beam Technology enables site-specific cross-sectioning and precise material removal, allowing failure-analysis engineers to expose targeted structures and prepare ultrathin specimens for TEM or STEM analysis. Semiconductor applications span logic, memory, advanced packaging, power devices and MEMS, while OLED manufacturing requires

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analysis of increasingly thin and complex multilayer stacks. New energy is another important driver as battery developers use FIB-SEM and FIB-SIMS to study electrode morphology, cracks, binders, elemental distributions and three-dimensional microstructures. Advanced-material research similarly requires localized milling, tomography and nanoscale specimen preparation. As these industries move toward smaller features and more complex heterogeneous structures, demand shifts toward instruments that combine nanoscale targeting with high-resolution imaging, chemical analysis and automated workflows.

Restraints

Focused Ion Beam Technology remains constrained by high instrument complexity, capital intensity and demanding application expertise. High-vacuum systems, ion columns, electron optics, precision stages, detectors, vibration control and sophisticated software create substantial equipment and maintenance costs. Ion-solid interactions can also introduce implantation, amorphization, redeposition or surface damage, making beam species, acceleration voltage, current and final polishing conditions critical to specimen quality. Ga FIB provides excellent fine-beam precision but can introduce gallium into sensitive specimens, while plasma FIB improves high-current milling and enables Ga-free preparation but generally requires more complex ion-source and beam-control architectures. Throughput is another constraint for conventional low-current FIB when preparing large cross-sections or statistically meaningful three-dimensional volumes. Effective operation therefore depends on experienced users, carefully controlled workflows and increasingly sophisticated automation, limiting rapid penetration into laboratories or production environments without sufficient microscopy and materials-analysis capabilities.

Opportunities

The most significant opportunity lies in combining nanoscale precision with higher-throughput large-volume processing. Plasma FIB platforms can operate at much higher maximum beam currents than conventional Ga FIB, expanding applications in advanced packaging, wide cross-section preparation, battery electrodes, large-volume tomography and deeply buried defect analysis. Multi-ion plasma sources add another layer of flexibility by allowing different ion species to be selected for specific materials and process objectives. FIB-SIMS represents a second important opportunity because integration of focused ion-beam milling with secondary ion mass spectrometry enables sensitive analysis of light elements, trace components and isotopic distributions that are

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difficult to characterize using conventional EDS alone. This capability is particularly relevant to lithium-containing battery materials and complex nanoscale structures. Further opportunities arise from automated TEM sample preparation, unattended serial sectioning, software-defined process recipes and AI-assisted image and workflow management, which can broaden adoption from specialist research laboratories toward higher-volume semiconductor and industrial quality-control environments.

Challenges

The central long-term challenge is simultaneously improving spatial precision, throughput and specimen integrity. Increasing beam current accelerates milling but can broaden the probe and increase thermal or ion-induced damage, while extremely fine beams provide high precision at lower material-removal rates. Different sample classes also respond differently to Ga, Xe, Ar, O and other ion species, requiring application-specific process optimization. Advanced semiconductor nodes, OLED multilayers and battery materials introduce additional complexity because target structures may be deeply buried, mechanically fragile, chemically reactive or composed of multiple materials with different sputtering behavior. FIB-SIMS adds analytical sensitivity but also increases system integration, calibration and data-processing requirements. Meanwhile, users increasingly expect automated, repeatable results across operators and sites. Equipment suppliers must therefore coordinate ion-source engineering, electron optics, stage accuracy, detector integration, software automation and application-specific recipes while maintaining uptime and serviceability in instruments that are already technically complex.

Industry Chain Analysis

The upstream industry chain of Focused Ion Beam Technology consists of ion sources, ion and electron optical components, high-voltage power supplies, vacuum pumps and chambers, precision stages, detectors, mass spectrometry modules, gas-injection systems, manipulators, control electronics and advanced software. The ion column is a core technology module. Ga liquid metal ion sources are mature and capable of highly focused beams for precise nanoscale milling, while gaseous plasma sources use plasma generation architectures to deliver substantially greater high-current processing capability. Electron columns are equally important in FIB-SEM because they provide high-resolution observation of surfaces and newly milled cross-sections. For FIB-SIMS, secondary-ion extraction optics and mass analyzers add chemical and isotopic

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information to the physical milling workflow. Performance therefore depends on coordinated control of source brightness, aberration, beam current, spot size, stage stability, vacuum, detection efficiency and software calibration.

Midstream equipment manufacturers integrate these subsystems into FIB-SEM, FIB-SIMS and related focused-ion-beam platforms and create additional value through beam-control algorithms, automated navigation, gas-assisted deposition or etching, sample lift-out, three-dimensional reconstruction and application-specific workflows. Downstream customers include semiconductor fabrication and failure-analysis laboratories, OLED and display developers, battery and new-energy researchers, advanced-material laboratories and universities or national research facilities. System economics are driven by precision ion and electron optics, vacuum and detector hardware, application software, installation, calibration and lifecycle service. As instruments become increasingly automated, software, workflow libraries and application support account for a growing portion of customer value because they determine how efficiently high-end hardware can be translated into repeatable analytical results.

Segment Insights

By ion source type, gallium liquid metal ion source systems remain an important technology route for high-precision nanoscale processing and site-specific specimen preparation. Ga sources provide mature beam-control characteristics and are widely used for cross-section preparation, TEM lamella fabrication, circuit modification and fine milling. Gaseous plasma ion sources address applications requiring substantially higher milling currents and larger processed volumes. Xenon is a major plasma ion species, while newer systems can also support argon, oxygen and nitrogen, increasing process flexibility for different materials. The two technology routes therefore address different combinations of precision, processing rate, material compatibility and processed volume. Official system documentation shows that modern Ga FIB can achieve several-nanometer-scale performance, while plasma platforms can provide much higher maximum currents for large-area milling.

Under the minimum beam-spot classification used in this study, the ?50nm threshold represents broad nanoscale focused-beam processing capability, while ?5nm highlights applications requiring particularly fine beam control and localized machining. A Thermo Fisher technical document notes that advanced Ga LMIS probe sizes have progressed to approximately 5–7nm, and JEOL specifies 3nm FIB image resolution for its JIB-PS500i, illustrating continued improvements in fine-beam performance. By supporting

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composite system, FIB-SEM remains fundamental for milling combined with immediate high-resolution imaging, serial sectioning and three-dimensional reconstruction. FIB-SIMS adds elemental and isotopic analysis, including high-sensitivity detection of light elements and depth-resolved chemical mapping, making it particularly valuable for new energy and advanced-material research.

Downstream Market Opportunities

Semiconductor represents a central industrial opportunity for Focused Ion Beam Technology because advanced devices require localized failure analysis, cross-section preparation, TEM lamella fabrication, delayering and three-dimensional investigation of buried structures. Advanced packaging further broadens the processed length scale through chiplets, TSVs, micro-bumps and complex interconnect architectures. OLED applications create demand for precise cross-sectioning of thin-film transistor backplanes and delicate organic multilayers; plasma FIB systems can process wider cross-sections while maintaining layer integrity. In new energy, FIB-SEM supports three-dimensional analysis of electrodes, pores, particles, cracks and binder distributions, while FIB-SIMS provides additional chemical information for lithium and other light elements. Advanced materials represent a broad opportunity encompassing metals, ceramics, polymers, composites and functional materials, with demand centered on site-specific sample preparation, microstructural tomography and correlative analysis. These downstream markets increasingly favor multifunctional instruments that shorten the workflow from defect localization to structural and chemical characterization.

Regional Insights

North America and Europe represent important technology-development and high-end application markets for Focused Ion Beam Technology, supported by advanced semiconductor, microscopy, materials-science and research infrastructures. Thermo Fisher Scientific has developed broad Ga FIB, plasma FIB and FIB-SIMS capabilities, while Carl Zeiss AG emphasizes high-resolution FIB-SEM, automated lamella preparation and three-dimensional materials characterization. TESCAN GROUP has established both Ga and plasma FIB-SEM platforms and continues to expand high-throughput Xe plasma processing, semiconductor and large-volume analysis capabilities. RAITH GmbH provides focused-ion-beam nanofabrication and specialized FIB-SIMS nanoanalysis, extending regional participation toward high-resolution elemental and isotopic characterization.

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East Asia is another major application and equipment-development cluster because of its semiconductor, display, battery and advanced-material industries. Hitachi High-Tech Corporation and JEOL Ltd. maintain established FIB/FIB-SEM platforms in Japan for high-precision processing, TEM specimen preparation and three-dimensional analysis. Hitachi High-Tech has also strengthened FIB-SEM research infrastructure related to semiconductors, green materials and advanced materials. In China, Ciqtek Co., Ltd. has entered the FIB-SEM equipment field with a Ga liquid metal ion source system and independently developed ion-column technology, broadening domestic participation in high-end electron and ion microscopy. Regional demand is therefore influenced by semiconductor process complexity, OLED and display manufacturing, battery-material development and continued investment in advanced microscopy infrastructure.

Competitive Landscape Analysis

Focused Ion Beam Technology has a technologically concentrated competitive structure in which differentiation depends on ion-source capability, beam precision, milling throughput, electron-optical performance, analytical integration, workflow automation and application support. Thermo Fisher Scientific Inc. maintains a broad portfolio spanning Ga DualBeam, Xe plasma FIB and multi-ion plasma architectures, together with FIB-SIMS and automated semiconductor, battery and materials-analysis workflows. Carl Zeiss AG competes through its Crossbeam FIB-SEM platform, emphasizing high-resolution electron imaging, low-energy finishing, automated lamella preparation and increasingly real-time monitoring of milling processes. TESCAN GROUP combines mature Ga FIB with high-current Xe plasma FIB platforms and targets semiconductors, OLED cross-sectioning, batteries, materials science and large-volume tomography. Hitachi High-Tech Corporation emphasizes precision FIB-SEM processing, real-time three-dimensional analysis and TEM/APT sample preparation, while JEOL Ltd. provides Ga-source multi-beam systems with fine milling and high-current processing capability. RAITH GmbH occupies a differentiated position in nanofabrication and FIB-SIMS, integrating focused ion beams with high-resolution secondary-ion mass spectrometry. Ciqtek Co., Ltd. expands competition through its DB550 Ga FIB-SEM and internally developed ion-column technology. Across these suppliers, competitive focus is moving toward the combined optimization of sub-10nm beam capability, high-current milling, automated sample preparation, multimodal analysis and reproducible high-throughput operation.

Report Scope

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This report studies the global Focused Ion Beam Technology demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Focused Ion Beam Technology, 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 Focused Ion Beam Technology that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Focused Ion Beam Technology total market, 2021-2032, (USD Million)

Global Focused Ion Beam Technology total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Focused Ion Beam Technology total market, key domestic companies, and share, (USD Million)

Global Focused Ion Beam Technology revenue by player, revenue and market share 2021-2026, (USD Million)

Global Focused Ion Beam Technology total market by Type, CAGR, 2021-2032, (USD Million)

Global Focused Ion Beam Technology total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Focused Ion Beam Technology market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Thermo Fisher Scientific Inc., Carl Zeiss AG, TESCAN GROUP, Hitachi High-Tech Corporation, JEOL Ltd., RAITH GmbH, Ciqtek Co., Ltd., etc.

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Focused Ion Beam Technology market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, 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 Focused Ion Beam Technology Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Focused Ion Beam Technology Market, Segmentation by Type:

Gas Liquid Metal Ion Source

Gaseous Plasma Ion Source

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Global Focused Ion Beam Technology Market, Segmentation by Minimum Ion Beam Diameter:

?50nm

?5nm

Global Focused Ion Beam Technology Market, Segmentation by Supporting Composite System:

?FIB-SEM

?FIB-SIMS

Global Focused Ion Beam Technology Market, Segmentation by Application:

Semiconductor

OLED

New Energy

Advanced Materials

Other

Companies Profiled:

Thermo Fisher Scientific Inc.

Carl Zeiss AG

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TESCAN GROUP

Hitachi High-Tech Corporation

JEOL Ltd.

RAITH GmbH

Ciqtek Co., Ltd.

Key Questions Answered

1. How big is the global Focused Ion Beam Technology market?
2. What is the demand of the global Focused Ion Beam Technology market?
3. What is the year over year growth of the global Focused Ion Beam Technology market?
4. What is the total value of the global Focused Ion Beam Technology market?
5. Who are the Major Players in the global Focused Ion Beam Technology market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Focused Ion Beam Technology Introduction
1.2 World Focused Ion Beam Technology Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Focused Ion Beam Technology Total Market by Region (by Headquarter Location)
  1.3.1 World Focused Ion Beam Technology Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.3 China Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.4 Europe Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.5 Japan Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.6 South Korea Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.7 ASEAN Based Company Focused Ion Beam Technology Revenue (2021-2032)
  1.3.8 India Based Company Focused Ion Beam Technology Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Focused Ion Beam Technology Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Focused Ion Beam Technology Consumption Value (2021-2032)
2.2 World Focused Ion Beam Technology Consumption Value by Region
  2.2.1 World Focused Ion Beam Technology Consumption Value by Region (2021-2026)
  2.2.2 World Focused Ion Beam Technology Consumption Value Forecast by Region (2027-2032)
2.3 United States Focused Ion Beam Technology Consumption Value (2021-2032)
2.4 China Focused Ion Beam Technology Consumption Value (2021-2032)
2.5 Europe Focused Ion Beam Technology Consumption Value (2021-2032)
2.6 Japan Focused Ion Beam Technology Consumption Value (2021-2032)
2.7 South Korea Focused Ion Beam Technology Consumption Value (2021-2032)
2.8 ASEAN Focused Ion Beam Technology Consumption Value (2021-2032)

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info@marketpublishers.com

2.9 India Focused Ion Beam Technology Consumption Value (2021-2032)

3 WORLD FOCUSED ION BEAM TECHNOLOGY COMPANIES COMPETITIVE ANALYSIS

3.1 World Focused Ion Beam Technology Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Focused Ion Beam Technology Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Focused Ion Beam Technology in 2025
  3.2.3 Global Concentration Ratios (CR8) for Focused Ion Beam Technology in 2025
3.3 Focused Ion Beam Technology Company Evaluation Quadrant
3.4 Focused Ion Beam Technology Market: Overall Company Footprint Analysis
  3.4.1 Focused Ion Beam Technology Market: Region Footprint
  3.4.2 Focused Ion Beam Technology Market: Company Product Type Footprint
  3.4.3 Focused Ion Beam Technology Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Focused Ion Beam Technology Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Focused Ion Beam Technology Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: Focused Ion Beam Technology Revenue Market Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: Focused Ion Beam Technology Consumption Value Comparison
  4.2.1 United States VS China: Focused Ion Beam Technology Consumption Value Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Focused Ion Beam Technology Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Focused Ion Beam Technology Companies and Market Share, 2021-2026
  4.3.1 United States Based Focused Ion Beam Technology Companies, Headquarters

+357 96 030922
info@marketpublishers.com

(States, Country)
4.3.2 United States Based Companies Focused Ion Beam Technology Revenue, (2021-2026)
4.4 China Based Companies Focused Ion Beam Technology Revenue and Market Share, 2021-2026
4.4.1 China Based Focused Ion Beam Technology Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies Focused Ion Beam Technology Revenue, (2021-2026)
4.5 Rest of World Based Focused Ion Beam Technology Companies and Market Share, 2021-2026
4.5.1 Rest of World Based Focused Ion Beam Technology Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies Focused Ion Beam Technology Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Focused Ion Beam Technology Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Gas Liquid Metal Ion Source
5.2.2 Gaseous Plasma Ion Source
5.3 Market Segment by Type
5.3.1 World Focused Ion Beam Technology Market Size by Type (2021-2026)
5.3.2 World Focused Ion Beam Technology Market Size by Type (2027-2032)
5.3.3 World Focused Ion Beam Technology Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY MINIMUM ION BEAM DIAMETER

6.1 World Focused Ion Beam Technology Market Size Overview by Minimum Ion Beam Diameter: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Minimum Ion Beam Diameter
6.2.1 ?50nm
6.2.2 ?5nm
6.3 Market Segment by Minimum Ion Beam Diameter
6.3.1 World Focused Ion Beam Technology Market Size by Minimum Ion Beam Diameter (2021-2026)
6.3.2 World Focused Ion Beam Technology Market Size by Minimum Ion Beam

+357 96 030922
info@marketpublishers.com

Diameter (2027-2032)
6.3.3 World Focused Ion Beam Technology Market Size Market Share by Minimum Ion Beam Diameter (2027-2032)

7 MARKET ANALYSIS BY SUPPORTING COMPOSITE SYSTEM

7.1 World Focused Ion Beam Technology Market Size Overview by Supporting Composite System: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Supporting Composite System
7.2.1 ?FIB-SEM
7.2.2 ?FIB-SIMS
7.3 Market Segment by Supporting Composite System
7.3.1 World Focused Ion Beam Technology Market Size by Supporting Composite System (2021-2026)
7.3.2 World Focused Ion Beam Technology Market Size by Supporting Composite System (2027-2032)
7.3.3 World Focused Ion Beam Technology Market Size Market Share by Supporting Composite System (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Focused Ion Beam Technology Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Semiconductor
8.2.2 OLED
8.2.3 New Energy
8.2.4 Advanced Materials
8.2.5 Other
8.3 Market Segment by Application
8.3.1 World Focused Ion Beam Technology Market Size by Application (2021-2026)
8.3.2 World Focused Ion Beam Technology Market Size by Application (2027-2032)
8.3.3 World Focused Ion Beam Technology Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Thermo Fisher Scientific Inc.
9.1.1 Thermo Fisher Scientific Inc. Details

+357 96 030922
info@marketpublishers.com

9.1.2 Thermo Fisher Scientific Inc. Major Business
9.1.3 Thermo Fisher Scientific Inc. Focused Ion Beam Technology Product and Services
9.1.4 Thermo Fisher Scientific Inc. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 Thermo Fisher Scientific Inc. Recent Developments/Updates
9.1.6 Thermo Fisher Scientific Inc. Competitive Strengths & Weaknesses
9.2 Carl Zeiss AG
9.2.1 Carl Zeiss AG Details
9.2.2 Carl Zeiss AG Major Business
9.2.3 Carl Zeiss AG Focused Ion Beam Technology Product and Services
9.2.4 Carl Zeiss AG Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 Carl Zeiss AG Recent Developments/Updates
9.2.6 Carl Zeiss AG Competitive Strengths & Weaknesses
9.3 TESCAN GROUP
9.3.1 TESCAN GROUP Details
9.3.2 TESCAN GROUP Major Business
9.3.3 TESCAN GROUP Focused Ion Beam Technology Product and Services
9.3.4 TESCAN GROUP Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.3.5 TESCAN GROUP Recent Developments/Updates
9.3.6 TESCAN GROUP Competitive Strengths & Weaknesses
9.4 Hitachi High-Tech Corporation
9.4.1 Hitachi High-Tech Corporation Details
9.4.2 Hitachi High-Tech Corporation Major Business
9.4.3 Hitachi High-Tech Corporation Focused Ion Beam Technology Product and Services
9.4.4 Hitachi High-Tech Corporation Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 Hitachi High-Tech Corporation Recent Developments/Updates
9.4.6 Hitachi High-Tech Corporation Competitive Strengths & Weaknesses
9.5 JEOL Ltd.
9.5.1 JEOL Ltd. Details
9.5.2 JEOL Ltd. Major Business
9.5.3 JEOL Ltd. Focused Ion Beam Technology Product and Services
9.5.4 JEOL Ltd. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 JEOL Ltd. Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

9.5.6 JEOL Ltd. Competitive Strengths & Weaknesses
9.6 RAITH GmbH
9.6.1 RAITH GmbH Details
9.6.2 RAITH GmbH Major Business
9.6.3 RAITH GmbH Focused Ion Beam Technology Product and Services
9.6.4 RAITH GmbH Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 RAITH GmbH Recent Developments/Updates
9.6.6 RAITH GmbH Competitive Strengths & Weaknesses
9.7 Ciqtek Co., Ltd.
9.7.1 Ciqtek Co., Ltd. Details
9.7.2 Ciqtek Co., Ltd. Major Business
9.7.3 Ciqtek Co., Ltd. Focused Ion Beam Technology Product and Services
9.7.4 Ciqtek Co., Ltd. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Ciqtek Co., Ltd. Recent Developments/Updates
9.7.6 Ciqtek Co., Ltd. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Focused Ion Beam Technology Industry Chain
10.2 Focused Ion Beam Technology Upstream Analysis
10.3 Focused Ion Beam Technology Midstream Analysis
10.4 Focused Ion Beam Technology Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Focused Ion Beam Technology Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Focused Ion Beam Technology Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Focused Ion Beam Technology Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Focused Ion Beam Technology Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Focused Ion Beam Technology Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Focused Ion Beam Technology Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Focused Ion Beam Technology Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Focused Ion Beam Technology Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Focused Ion Beam Technology Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Focused Ion Beam Technology Players in 2025
Table 12. World Focused Ion Beam Technology Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Focused Ion Beam Technology Company Evaluation Quadrant
Table 14. Head Office of Key Focused Ion Beam Technology Players
Table 15. Focused Ion Beam Technology Market: Company Product Type Footprint
Table 16. Focused Ion Beam Technology Market: Company Product Application Footprint
Table 17. Focused Ion Beam Technology Mergers & Acquisitions Activity
Table 18. United States VS China Focused Ion Beam Technology Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Focused Ion Beam Technology Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based Focused Ion Beam Technology Companies, Headquarters (States, Country)

+357 96 030922
info@marketpublishers.com

Table 21. United States Based Companies Focused Ion Beam Technology Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Focused Ion Beam Technology Revenue Market Share (2021-2026)
Table 23. China Based Focused Ion Beam Technology Companies, Headquarters (Province, Country)
Table 24. China Based Companies Focused Ion Beam Technology Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Focused Ion Beam Technology Revenue Market Share (2021-2026)
Table 26. Rest of World Based Focused Ion Beam Technology Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Focused Ion Beam Technology Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Focused Ion Beam Technology Revenue Market Share (2021-2026)
Table 29. World Focused Ion Beam Technology Market Size by Type, (USD Million), 2021 & 2025 & 2032
Table 30. World Focused Ion Beam Technology Market Size Value by Type (2021-2026) & (USD Million)
Table 31. World Focused Ion Beam Technology Market Size by Type (2027-2032) & (USD Million)
Table 32. World Focused Ion Beam Technology Market Size by Minimum Ion Beam Diameter, (USD Million), 2021 & 2025 & 2032
Table 33. World Focused Ion Beam Technology Market Size Value by Minimum Ion Beam Diameter (2021-2026) & (USD Million)
Table 34. World Focused Ion Beam Technology Market Size by Minimum Ion Beam Diameter (2027-2032) & (USD Million)
Table 35. World Focused Ion Beam Technology Market Size by Supporting Composite System, (USD Million), 2021 & 2025 & 2032
Table 36. World Focused Ion Beam Technology Market Size Value by Supporting Composite System (2021-2026) & (USD Million)
Table 37. World Focused Ion Beam Technology Market Size by Supporting Composite System (2027-2032) & (USD Million)
Table 38. World Focused Ion Beam Technology Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World Focused Ion Beam Technology Market Size by Application (2021-2026) & (USD Million)
Table 40. World Focused Ion Beam Technology Market Size by Application (2027-2032)

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& (USD Million)
Table 41. Thermo Fisher Scientific Inc. Basic Information, Manufacturing Base and Competitors
Table 42. Thermo Fisher Scientific Inc. Major Business
Table 43. Thermo Fisher Scientific Inc. Focused Ion Beam Technology Product and Services
Table 44. Thermo Fisher Scientific Inc. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Thermo Fisher Scientific Inc. Recent Developments/Updates
Table 46. Thermo Fisher Scientific Inc. Competitive Strengths & Weaknesses
Table 47. Carl Zeiss AG Basic Information, Manufacturing Base and Competitors
Table 48. Carl Zeiss AG Major Business
Table 49. Carl Zeiss AG Focused Ion Beam Technology Product and Services
Table 50. Carl Zeiss AG Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Carl Zeiss AG Recent Developments/Updates
Table 52. Carl Zeiss AG Competitive Strengths & Weaknesses
Table 53. TESCAN GROUP Basic Information, Manufacturing Base and Competitors
Table 54. TESCAN GROUP Major Business
Table 55. TESCAN GROUP Focused Ion Beam Technology Product and Services
Table 56. TESCAN GROUP Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. TESCAN GROUP Recent Developments/Updates
Table 58. TESCAN GROUP Competitive Strengths & Weaknesses
Table 59. Hitachi High-Tech Corporation Basic Information, Manufacturing Base and Competitors
Table 60. Hitachi High-Tech Corporation Major Business
Table 61. Hitachi High-Tech Corporation Focused Ion Beam Technology Product and Services
Table 62. Hitachi High-Tech Corporation Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Hitachi High-Tech Corporation Recent Developments/Updates
Table 64. Hitachi High-Tech Corporation Competitive Strengths & Weaknesses
Table 65. JEOL Ltd. Basic Information, Manufacturing Base and Competitors
Table 66. JEOL Ltd. Major Business
Table 67. JEOL Ltd. Focused Ion Beam Technology Product and Services
Table 68. JEOL Ltd. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. JEOL Ltd. Recent Developments/Updates

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Table 70. JEOL Ltd. Competitive Strengths & Weaknesses
Table 71. RAITH GmbH Basic Information, Manufacturing Base and Competitors
Table 72. RAITH GmbH Major Business
Table 73. RAITH GmbH Focused Ion Beam Technology Product and Services
Table 74. RAITH GmbH Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. RAITH GmbH Recent Developments/Updates
Table 76. RAITH GmbH Competitive Strengths & Weaknesses
Table 77. Ciqtek Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 78. Ciqtek Co., Ltd. Major Business
Table 79. Ciqtek Co., Ltd. Focused Ion Beam Technology Product and Services
Table 80. Ciqtek Co., Ltd. Focused Ion Beam Technology Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Ciqtek Co., Ltd. Recent Developments/Updates
Table 82. Ciqtek Co., Ltd. Competitive Strengths & Weaknesses
Table 83. Global Key Players of Focused Ion Beam Technology Upstream (Raw Materials)
Table 84. Global Focused Ion Beam Technology Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Focused Ion Beam Technology Picture
Figure 2. World Focused Ion Beam Technology Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Focused Ion Beam Technology Total Revenue (2021-2032) & (USD Million)
Figure 4. World Focused Ion Beam Technology Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Focused Ion Beam Technology Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Focused Ion Beam Technology Revenue (2021-2032) & (USD Million)
Figure 13. Focused Ion Beam Technology Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 16. World Focused Ion Beam Technology Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 18. China Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 23. India Focused Ion Beam Technology Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Focused Ion Beam Technology by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Focused Ion Beam Technology Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Focused Ion Beam Technology Markets in 2025
Figure 27. United States VS China: Focused Ion Beam Technology Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Focused Ion Beam Technology Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Focused Ion Beam Technology Market Size by Type, (USD Million), 2021 & 2025 & 2032
Figure 30. World Focused Ion Beam Technology Market Size Market Share by Type in 2025
Figure 31. Gas Liquid Metal Ion Source
Figure 32. Gaseous Plasma Ion Source
Figure 33. World Focused Ion Beam Technology Market Size Market Share by Type (2021-2032)
Figure 34. World Focused Ion Beam Technology Market Size by Minimum Ion Beam Diameter, (USD Million), 2021 & 2025 & 2032
Figure 35. World Focused Ion Beam Technology Market Size Market Share by Minimum Ion Beam Diameter in 2025
Figure 36. ?50nm
Figure 37. ?5nm
Figure 38. World Focused Ion Beam Technology Market Size Market Share by Minimum Ion Beam Diameter (2021-2032)
Figure 39. World Focused Ion Beam Technology Market Size by Supporting Composite System, (USD Million), 2021 & 2025 & 2032
Figure 40. World Focused Ion Beam Technology Market Size Market Share by Supporting Composite System in 2025
Figure 41. ?FIB-SEM

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Figure 42. ?FIB-SIMS
Figure 43. World Focused Ion Beam Technology Market Size Market Share by Supporting Composite System (2021-2032)
Figure 44. World Focused Ion Beam Technology Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 45. World Focused Ion Beam Technology Market Size Market Share by Application in 2025
Figure 46. Semiconductor
Figure 47. OLED
Figure 48. New Energy
Figure 49. Advanced Materials
Figure 50. Other
Figure 51. World Focused Ion Beam Technology Market Size Market Share by Application (2021-2032)
Figure 52. Focused Ion Beam Technology Industrial Chain
Figure 53. Methodology
Figure 54. Research Process and Data Source

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