

# Global Ion Beam Etching Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Ion Beam Etching Equipment market size is expected to reach \$ 1448 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

In 2025, the production of ion beam etching equipment will reach 1072 units, with an average selling price of US\$949,600 per unit.

To address the problems of isotropic etching (non-vertical sidewalls), chemical residue, limited material selectivity, and environmental unfriendliness in traditional wet etching processes, ion beam etching (IBE) equipment has emerged. This equipment is a dry micro-nano processing tool that uses a high-energy ion beam to bombard the material surface, achieving material removal through a purely physical sputtering effect. Its core principle is to ionize inert gases such as argon to form plasma, which is then accelerated by an electric field to form a highly directional ion beam, thereby achieving anisotropic, high-precision pattern processing of various materials such as conductors, semiconductors, and insulators. Since the rise of the microelectronics industry in the latter half of the 20th century, ion beam etching technology has continuously evolved, giving rise to composite processes such as reactive ion beam etching (RIBE) and ion beam assisted etching (IBAE), and has moved from laboratories to large-scale industrial applications. Currently, ion beam etching equipment has formed a complete product range covering R&D, mass production, and customized models, and is widely used in cutting-edge fields such as semiconductor integrated circuits, micro-electromechanical systems (MEMS), optical components, data storage, and advanced scientific research. In 2025, the global ion beam etching equipment market will benefit from the continuous miniaturization of semiconductor technology nodes, the strong demand for third-generation semiconductors, quantum computing, and advanced optical devices. In terms of price, the average price of research-grade basic ion beam etching machines is approximately US\$450,000-600,000 per unit, while the average price of high-precision

semiconductor industrial-grade models can reach US\$1-2 million per unit. In terms of production capacity, the industry exhibits the characteristics of 'high technical barriers and low production capacity release,' with a single company's annual production capacity of approximately 40-50 units, and an average industry capacity utilization rate of over 90%. The average gross profit margin can reach 30%. Typical Transaction Case

In the second quarter of 2025, the University of Electronic Science and Technology of China purchased an ion beam etching machine, model IBE-150, from Beijing Advance Ion Beam Technology Research Institute Co., Ltd., for a total of US\$455,000. The procurement requirements included: 'etching accuracy reaching sub-nanometer level, supporting etching of various materials such as silicon and oxides, vacuum degree  $< 5 \times 10^{-5}$  Pa, and ion beam energy adjustment range of 0.5-10 keV, for scientific research experiments and teaching research of micro-nano electronic devices.'

#### Industry Pain Points

The fundamental pain point of the ion beam etching equipment industry lies in the multiple contradictions between its atomic-level precision technology attributes and the advanced process iteration needs of the semiconductor industry, stringent technical standards, and the global oligopolistic competition landscape. The core pain points are specifically manifested as follows:

On the product side, the core technological barriers are extremely high. Key technologies such as ion source stability, high-precision beam control, and vacuum chamber cleanliness control have long been monopolized by overseas companies. Domestic enterprises lag behind in long-term operational stability (e.g., 1000 hours of continuous operation show 15% higher precision drift compared to Lam Research); at the same time, the equipment operation process is complex, requiring professional technicians for process parameter debugging and maintenance, which sets a high technical barrier for industry applications and limits market penetration.

On the market and regulatory side, global semiconductor equipment technical standards are dominated by European, American, and Japanese companies. Domestic products need to pass multiple certifications such as SEMI and ISO to enter mainstream international wafer fabs, with certification cycles lasting 12-24 months and high compliance costs; while the global market presents a typical 'oligopoly' pattern, with the three giants Lam Research, Tokyo Electron, and Applied Materials collectively occupying 85%-90% of the global etching equipment market share. Domestic enterprises are at a disadvantage in customer resources and ecosystem building, and the low-to-medium-end market is prone to homogeneous competition, further compressing profit margins and innovation momentum.

Industry Chain Structure  
The upstream of the ion beam etching equipment industry chain includes core materials (ion source materials such as gallium and liquid metal, vacuum chamber materials such

as stainless steel and aluminum alloy, ceramic coating materials supplied by Kyocera of Japan, and high-precision bearing materials from SKF of Sweden), key components (ion sources provided by Veeco of the United States, vacuum systems using German Pfeiffer technology, RF power supplies manufactured by Yingjie Electric and Hengyunchang, precision motion platforms from THK of Japan, and control system chips using Qualcomm products from the United States), and technical support (precision processing equipment relying on German Junger grinding machines, vacuum technology services supported by the Institute of Physics of the Chinese Academy of Sciences, plasma control algorithms developed by university research institutions, and AI process optimization systems provided by domestic technology companies). In downstream applications, the semiconductor manufacturing field accounts for 62%, focusing on 3D NAND memory chips, advanced logic chip processes, and compound semiconductor processing, with global industrial upgrading driving a 14% annual increase in demand; the scientific research and metrology field accounts for 20%, involving micro-nano processing research in universities, calibration services for metrology institutions, and quantum superconducting device development, with increased domestic research investment driving an 11% annual increase in demand; the aerospace field accounts for 10%, used in the manufacturing of precision sensors and navigation devices, with high-end equipment development driving steady demand growth; other fields account for 8%, including MEMS manufacturing, optical component processing, and precision parts manufacturing for medical equipment. Industry Trends and Challenges

Ion beam etching equipment is exhibiting several development trends: high precision (sub-angstrom level control, such as AMEC's 0.2A sub-angstrom precision equipment laying the foundation for 2nm and below processes), intelligence (integration of AI process optimization algorithms for automatic parameter adjustment and real-time defect monitoring and warning, with a 15% annual increase in penetration rate becoming a standard feature in mid-to-high-end products), multi-functionality (integration of etching/deposition/detection functions to form an integrated processing system, suitable for advanced packaging/heterogeneous integration scenarios), and accelerated domestic substitution (domestic enterprises are making breakthroughs in core technologies and key components, improving the self-sufficiency rate of the supply chain, and domestic equipment is rapidly increasing its penetration rate in domestic wafer fabs). In terms of opportunities, the global semiconductor equipment market is expected to reach US\$124 billion in 2025 (etching equipment: US\$30.16 billion), and the domestic market is expected to have a replacement space of US\$8.6 billion in 2025; the increasing number of 3D NAND stacking layers (over 300 layers) and the surge in HBM memory demand are driving a global annual shortage of approximately 200 high-aspect-ratio etching equipment units; China's '14th Five-Year Plan' policies and local

special funds are driving a 16% annual increase in procurement demand. However, challenges remain: high-end core components (ion sources, high-precision vacuum systems) still rely on imports (domestic self-sufficiency rate is over 90%, but breakthroughs are needed in high-end products), international certification cycles are long (12-24 months, involving multiple certifications such as SEMI/ISO, resulting in high costs), the global oligopoly structure is difficult to break in the short term, domestic enterprises are at a disadvantage in terms of customer resources/ecosystem, and competition in the mid-to-low-end market is intensifying, putting pressure on the survival of small and medium-sized enterprises.

#### Demand and Business Opportunity Analysis

The demand drivers and technological advantages of ion beam etching equipment are significant: advanced semiconductor processes (such as 7nm chip etching processes requiring 140 steps, 2.5 times more than 28nm, and 3nm and below processes) urgently require sub-angstrom precision, and using this equipment can improve yield by more than 25% and reduce the defect rate to below 0.2%; the global semiconductor self-sufficiency strategy is driving compliance requirements, with China, the United States, and the European Union mandating increased domestic equipment penetration rates, driving the replacement of existing equipment; emerging industries such as AI, 5G, and new energy, as well as 3D NAND, HBM, and advanced packaging technologies, are further expanding the incremental market. In terms of technical adaptability, leading products cover the full precision range from micrometers to sub-angstroms, supporting the etching of multiple materials including silicon, oxides, and metals. Customized solutions are available for special environments such as high temperature and high vacuum (with a coverage rate of 78%). Intelligent equipment reduces process debugging time from 4 hours to 1 hour, and continuous processing of wafer batches reduces unit costs to 60% of traditional equipment, significantly improving production efficiency. Domestic companies, through breakthroughs in core technologies and independent control of the supply chain, have achieved outstanding product cost-effectiveness. In 2024, AMEC's winning bid rate for new production lines in China reached 32%, and its global market share increased to 5.1%.

This report studies the global Ion Beam Etching Equipment production, demand, key manufacturers, and key regions.

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

#### **Highlights and key features of the study**

Global Ion Beam Etching Equipment total production and demand, 2021-2032, (Units)

Global Ion Beam Etching Equipment total production value, 2021-2032, (USD Million)  
Global Ion Beam Etching Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Ion Beam Etching Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Ion Beam Etching Equipment domestic production, consumption, key domestic manufacturers and share

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

Global Ion Beam Etching Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Ion Beam Etching Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Ion Beam Etching 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 Veeco Instruments, Hitachi High-Tech, Oxford Instruments Plasma Technology, Canon Anelva Corporation, Plasma-Therm, SENTECH Instruments, Guoguang Liangchao, Lam Research, Tokyo Electron, Applied Materials, 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 Ion Beam Etching 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 Ion Beam Etching Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Ion Beam Etching Equipment Market, Segmentation by Type:

Conventional Ion Beam Etching (IBE) Equipment

Reactive Ion Beam Etching (RIBE) Equipment

Ion Beam Assisted Etching/Deposition (IBAE/IBAD) Systems

Global Ion Beam Etching Equipment Market, Segmentation by Etching Accuracy:

Error ? 0.1 ?

Error ? 1 nm

Error ? 1 ?m

Global Ion Beam Etching Equipment Market, Segmentation by Ion Source:

Gallium Ion Source

Liquid Metal Ion Source

Gas Ion Source

Global Ion Beam Etching Equipment Market, Segmentation by Application:

Semiconductor Manufacturing

Research and Metrology

Aerospace

Other

### **Companies Profiled:**

Veeco Instruments

Hitachi High-Tech

Oxford Instruments Plasma Technology

Canon Anelva Corporation

Plasma-Therm

SENTECH Instruments

Guoguang Liangchao

Lam Research

Tokyo Electron

Applied Materials

Oxford Instruments

AMEC (Advanced Micro-Fabrication Equipment Inc.)

Northern Huachuang

Beijing Advance Ion Beam Technology Institute

Zhongke Weishi (Beijing) Technology Development

Beijing E-Town Semiconductor Technology

**Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Ion Beam Etching Equipment Production Value by Manufacturer (2021-2026)
- 3.2 World Ion Beam Etching Equipment Production by Manufacturer (2021-2026)
- 3.3 World Ion Beam Etching Equipment Average Price by Manufacturer (2021-2026)
- 3.4 Ion Beam Etching Equipment Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Ion Beam Etching Equipment Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Ion Beam Etching Equipment in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Ion Beam Etching Equipment in 2025
- 3.6 Ion Beam Etching Equipment Market: Overall Company Footprint Analysis
  - 3.6.1 Ion Beam Etching Equipment Market: Region Footprint
  - 3.6.2 Ion Beam Etching Equipment Market: Company Product Type Footprint
  - 3.6.3 Ion Beam Etching 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: Ion Beam Etching Equipment Production Value Comparison
  - 4.1.1 United States VS China: Ion Beam Etching Equipment Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Ion Beam Etching Equipment Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Ion Beam Etching Equipment Production Comparison
  - 4.2.1 United States VS China: Ion Beam Etching Equipment Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Ion Beam Etching Equipment Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Ion Beam Etching Equipment Consumption Comparison
  - 4.3.1 United States VS China: Ion Beam Etching Equipment Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Ion Beam Etching Equipment Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Ion Beam Etching Equipment Manufacturers and Market

Share, 2021-2026

4.4.1 United States Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Ion Beam Etching Equipment Production Value (2021-2026)

4.4.3 United States Based Manufacturers Ion Beam Etching Equipment Production (2021-2026)

4.5 China Based Ion Beam Etching Equipment Manufacturers and Market Share

4.5.1 China Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Ion Beam Etching Equipment Production Value (2021-2026)

4.5.3 China Based Manufacturers Ion Beam Etching Equipment Production (2021-2026)

4.6 Rest of World Based Ion Beam Etching Equipment Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Ion Beam Etching Equipment Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Ion Beam Etching Equipment Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Ion Beam Etching Equipment Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Conventional Ion Beam Etching (IBE) Equipment

5.2.2 Reactive Ion Beam Etching (RIBE) Equipment

5.2.3 Ion Beam Assisted Etching/Deposition (IBAE/IBAD) Systems

5.3 Market Segment by Type

5.3.1 World Ion Beam Etching Equipment Production by Type (2021-2032)

5.3.2 World Ion Beam Etching Equipment Production Value by Type (2021-2032)

5.3.3 World Ion Beam Etching Equipment Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY ETCHING ACCURACY**

6.1 World Ion Beam Etching Equipment Market Size Overview by Etching Accuracy:

2021 VS 2025 VS 2032

6.2 Segment Introduction by Etching Accuracy

6.2.1 Error ? 0.1 ?

6.2.2 Error ? 1 nm

6.2.3 Error ? 1 ?m

6.3 Market Segment by Etching Accuracy

6.3.1 World Ion Beam Etching Equipment Production by Etching Accuracy  
(2021-2032)

6.3.2 World Ion Beam Etching Equipment Production Value by Etching Accuracy  
(2021-2032)

6.3.3 World Ion Beam Etching Equipment Average Price by Etching Accuracy  
(2021-2032)

## **7 MARKET ANALYSIS BY ION SOURCE**

7.1 World Ion Beam Etching Equipment Market Size Overview by Ion Source: 2021 VS  
2025 VS 2032

7.2 Segment Introduction by Ion Source

7.2.1 Gallium Ion Source

7.2.2 Liquid Metal Ion Source

7.2.3 Gas Ion Source

7.3 Market Segment by Ion Source

7.3.1 World Ion Beam Etching Equipment Production by Ion Source (2021-2032)

7.3.2 World Ion Beam Etching Equipment Production Value by Ion Source (2021-2032)

7.3.3 World Ion Beam Etching Equipment Average Price by Ion Source (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Ion Beam Etching Equipment Market Size Overview by Application: 2021 VS  
2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Semiconductor Manufacturing

8.2.2 Research and Metrology

8.2.3 Aerospace

8.2.4 Other

8.3 Market Segment by Application

8.3.1 World Ion Beam Etching Equipment Production by Application (2021-2032)

8.3.2 World Ion Beam Etching Equipment Production Value by Application  
(2021-2032)

### 8.3.3 World Ion Beam Etching Equipment Average Price by Application (2021-2032)

## 9 COMPANY PROFILES

### 9.1 Veeco Instruments

#### 9.1.1 Veeco Instruments Details

#### 9.1.2 Veeco Instruments Major Business

#### 9.1.3 Veeco Instruments Ion Beam Etching Equipment Product and Services

#### 9.1.4 Veeco Instruments Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.1.5 Veeco Instruments Recent Developments/Updates

#### 9.1.6 Veeco Instruments Competitive Strengths & Weaknesses

### 9.2 Hitachi High-Tech

#### 9.2.1 Hitachi High-Tech Details

#### 9.2.2 Hitachi High-Tech Major Business

#### 9.2.3 Hitachi High-Tech Ion Beam Etching Equipment Product and Services

#### 9.2.4 Hitachi High-Tech Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.2.5 Hitachi High-Tech Recent Developments/Updates

#### 9.2.6 Hitachi High-Tech Competitive Strengths & Weaknesses

### 9.3 Oxford Instruments Plasma Technology

#### 9.3.1 Oxford Instruments Plasma Technology Details

#### 9.3.2 Oxford Instruments Plasma Technology Major Business

#### 9.3.3 Oxford Instruments Plasma Technology Ion Beam Etching Equipment Product and Services

#### 9.3.4 Oxford Instruments Plasma Technology Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.3.5 Oxford Instruments Plasma Technology Recent Developments/Updates

#### 9.3.6 Oxford Instruments Plasma Technology Competitive Strengths & Weaknesses

### 9.4 Canon Anelva Corporation

#### 9.4.1 Canon Anelva Corporation Details

#### 9.4.2 Canon Anelva Corporation Major Business

#### 9.4.3 Canon Anelva Corporation Ion Beam Etching Equipment Product and Services

#### 9.4.4 Canon Anelva Corporation Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 9.4.5 Canon Anelva Corporation Recent Developments/Updates

#### 9.4.6 Canon Anelva Corporation Competitive Strengths & Weaknesses

### 9.5 Plasma-Therm

#### 9.5.1 Plasma-Therm Details

- 9.5.2 Plasma-Therm Major Business
- 9.5.3 Plasma-Therm Ion Beam Etching Equipment Product and Services
- 9.5.4 Plasma-Therm Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.5.5 Plasma-Therm Recent Developments/Updates
- 9.5.6 Plasma-Therm Competitive Strengths & Weaknesses
- 9.6 SENTECH Instruments
  - 9.6.1 SENTECH Instruments Details
  - 9.6.2 SENTECH Instruments Major Business
  - 9.6.3 SENTECH Instruments Ion Beam Etching Equipment Product and Services
  - 9.6.4 SENTECH Instruments Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 SENTECH Instruments Recent Developments/Updates
  - 9.6.6 SENTECH Instruments Competitive Strengths & Weaknesses
- 9.7 Guoguang Liangchao
  - 9.7.1 Guoguang Liangchao Details
  - 9.7.2 Guoguang Liangchao Major Business
  - 9.7.3 Guoguang Liangchao Ion Beam Etching Equipment Product and Services
  - 9.7.4 Guoguang Liangchao Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Guoguang Liangchao Recent Developments/Updates
  - 9.7.6 Guoguang Liangchao Competitive Strengths & Weaknesses
- 9.8 Lam Research
  - 9.8.1 Lam Research Details
  - 9.8.2 Lam Research Major Business
  - 9.8.3 Lam Research Ion Beam Etching Equipment Product and Services
  - 9.8.4 Lam Research Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Lam Research Recent Developments/Updates
  - 9.8.6 Lam Research Competitive Strengths & Weaknesses
- 9.9 Tokyo Electron
  - 9.9.1 Tokyo Electron Details
  - 9.9.2 Tokyo Electron Major Business
  - 9.9.3 Tokyo Electron Ion Beam Etching Equipment Product and Services
  - 9.9.4 Tokyo Electron Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Tokyo Electron Recent Developments/Updates
  - 9.9.6 Tokyo Electron Competitive Strengths & Weaknesses
- 9.10 Applied Materials

- 9.10.1 Applied Materials Details
- 9.10.2 Applied Materials Major Business
- 9.10.3 Applied Materials Ion Beam Etching Equipment Product and Services
- 9.10.4 Applied Materials Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.10.5 Applied Materials Recent Developments/Updates
- 9.10.6 Applied Materials Competitive Strengths & Weaknesses
- 9.11 Oxford Instruments
  - 9.11.1 Oxford Instruments Details
  - 9.11.2 Oxford Instruments Major Business
  - 9.11.3 Oxford Instruments Ion Beam Etching Equipment Product and Services
  - 9.11.4 Oxford Instruments Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.11.5 Oxford Instruments Recent Developments/Updates
  - 9.11.6 Oxford Instruments Competitive Strengths & Weaknesses
- 9.12 AMEC (Advanced Micro-Fabrication Equipment Inc.)
  - 9.12.1 AMEC (Advanced Micro-Fabrication Equipment Inc.) Details
  - 9.12.2 AMEC (Advanced Micro-Fabrication Equipment Inc.) Major Business
  - 9.12.3 AMEC (Advanced Micro-Fabrication Equipment Inc.) Ion Beam Etching Equipment Product and Services
  - 9.12.4 AMEC (Advanced Micro-Fabrication Equipment Inc.) Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.12.5 AMEC (Advanced Micro-Fabrication Equipment Inc.) Recent Developments/Updates
  - 9.12.6 AMEC (Advanced Micro-Fabrication Equipment Inc.) Competitive Strengths & Weaknesses
- 9.13 Northern Huachuang
  - 9.13.1 Northern Huachuang Details
  - 9.13.2 Northern Huachuang Major Business
  - 9.13.3 Northern Huachuang Ion Beam Etching Equipment Product and Services
  - 9.13.4 Northern Huachuang Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.13.5 Northern Huachuang Recent Developments/Updates
  - 9.13.6 Northern Huachuang Competitive Strengths & Weaknesses
- 9.14 Beijing Advance Ion Beam Technology Institute
  - 9.14.1 Beijing Advance Ion Beam Technology Institute Details
  - 9.14.2 Beijing Advance Ion Beam Technology Institute Major Business
  - 9.14.3 Beijing Advance Ion Beam Technology Institute Ion Beam Etching Equipment Product and Services

- 9.14.4 Beijing Advance Ion Beam Technology Institute Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.14.5 Beijing Advance Ion Beam Technology Institute Recent Developments/Updates
- 9.14.6 Beijing Advance Ion Beam Technology Institute Competitive Strengths & Weaknesses
- 9.15 Zhongke Weishi (Beijing) Technology Development
  - 9.15.1 Zhongke Weishi (Beijing) Technology Development Details
  - 9.15.2 Zhongke Weishi (Beijing) Technology Development Major Business
  - 9.15.3 Zhongke Weishi (Beijing) Technology Development Ion Beam Etching Equipment Product and Services
  - 9.15.4 Zhongke Weishi (Beijing) Technology Development Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.15.5 Zhongke Weishi (Beijing) Technology Development Recent Developments/Updates
  - 9.15.6 Zhongke Weishi (Beijing) Technology Development Competitive Strengths & Weaknesses
- 9.16 Beijing E-Town Semiconductor Technology
  - 9.16.1 Beijing E-Town Semiconductor Technology Details
  - 9.16.2 Beijing E-Town Semiconductor Technology Major Business
  - 9.16.3 Beijing E-Town Semiconductor Technology Ion Beam Etching Equipment Product and Services
  - 9.16.4 Beijing E-Town Semiconductor Technology Ion Beam Etching Equipment Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.16.5 Beijing E-Town Semiconductor Technology Recent Developments/Updates
  - 9.16.6 Beijing E-Town Semiconductor Technology Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 Ion Beam Etching Equipment Industry Chain
- 10.2 Ion Beam Etching Equipment Upstream Analysis
  - 10.2.1 Ion Beam Etching Equipment Core Raw Materials
  - 10.2.2 Main Manufacturers of Ion Beam Etching Equipment Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Ion Beam Etching Equipment Production Mode
- 10.6 Ion Beam Etching Equipment Procurement Model
- 10.7 Ion Beam Etching Equipment Industry Sales Model and Sales Channels
  - 10.7.1 Ion Beam Etching Equipment Sales Model

10.7.2 Ion Beam Etching Equipment Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

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

Table 2. World Ion Beam Etching Equipment Production Value by Region (2021-2026) & (USD Million)

Table 3. World Ion Beam Etching Equipment Production Value by Region (2027-2032) & (USD Million)

Table 4. World Ion Beam Etching Equipment Production Value Market Share by Region (2021-2026)

Table 5. World Ion Beam Etching Equipment Production Value Market Share by Region (2027-2032)

Table 6. World Ion Beam Etching Equipment Production by Region (2021-2026) & (Units)

Table 7. World Ion Beam Etching Equipment Production by Region (2027-2032) & (Units)

Table 8. World Ion Beam Etching Equipment Production Market Share by Region (2021-2026)

Table 9. World Ion Beam Etching Equipment Production Market Share by Region (2027-2032)

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

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

Table 12. Ion Beam Etching Equipment Major Market Trends

Table 13. World Ion Beam Etching Equipment Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Ion Beam Etching Equipment Consumption by Region (2021-2026) & (Units)

Table 15. World Ion Beam Etching Equipment Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Ion Beam Etching Equipment Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Ion Beam Etching Equipment Producers in 2025

Table 18. World Ion Beam Etching Equipment Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Ion Beam Etching Equipment Producers in 2025

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

Table 21. Global Ion Beam Etching Equipment Company Evaluation Quadrant

Table 22. World Ion Beam Etching Equipment Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Ion Beam Etching Equipment Production Site of Key Manufacturer

Table 24. Ion Beam Etching Equipment Market: Company Product Type Footprint

Table 25. Ion Beam Etching Equipment Market: Company Product Application Footprint

Table 26. Ion Beam Etching Equipment Competitive Factors

Table 27. Ion Beam Etching Equipment New Entrant and Capacity Expansion Plans

Table 28. Ion Beam Etching Equipment Mergers & Acquisitions Activity

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

Table 30. United States VS China Ion Beam Etching Equipment Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Ion Beam Etching Equipment Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (States, Country)

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

Table 34. United States Based Manufacturers Ion Beam Etching Equipment Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Ion Beam Etching Equipment Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Ion Beam Etching Equipment Production Market Share (2021-2026)

Table 37. China Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Ion Beam Etching Equipment Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Ion Beam Etching Equipment Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Ion Beam Etching Equipment Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Ion Beam Etching Equipment Production Market

Share (2021-2026)

Table 42. Rest of World Based Ion Beam Etching Equipment Manufacturers, Headquarters and Production Site (State, Country)

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

Table 44. Rest of World Based Manufacturers Ion Beam Etching Equipment Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Ion Beam Etching Equipment Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Ion Beam Etching Equipment Production Market Share (2021-2026)

Table 47. World Ion Beam Etching Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Ion Beam Etching Equipment Production by Type (2021-2026) & (Units)

Table 49. World Ion Beam Etching Equipment Production by Type (2027-2032) & (Units)

Table 50. World Ion Beam Etching Equipment Production Value by Type (2021-2026) & (USD Million)

Table 51. World Ion Beam Etching Equipment Production Value by Type (2027-2032) & (USD Million)

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

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

Table 54. World Ion Beam Etching Equipment Production Value by Etching Accuracy, (USD Million), 2021 & 2025 & 2032

Table 55. World Ion Beam Etching Equipment Production by Etching Accuracy (2021-2026) & (Units)

Table 56. World Ion Beam Etching Equipment Production by Etching Accuracy (2027-2032) & (Units)

Table 57. World Ion Beam Etching Equipment Production Value by Etching Accuracy (2021-2026) & (USD Million)

Table 58. World Ion Beam Etching Equipment Production Value by Etching Accuracy (2027-2032) & (USD Million)

Table 59. World Ion Beam Etching Equipment Average Price by Etching Accuracy (2021-2026) & (K US\$/Unit)

Table 60. World Ion Beam Etching Equipment Average Price by Etching Accuracy (2027-2032) & (K US\$/Unit)

Table 61. World Ion Beam Etching Equipment Production Value by Ion Source, (USD Million), 2021 & 2025 & 2032

Table 62. World Ion Beam Etching Equipment Production by Ion Source (2021-2026) & (Units)

Table 63. World Ion Beam Etching Equipment Production by Ion Source (2027-2032) & (Units)

Table 64. World Ion Beam Etching Equipment Production Value by Ion Source (2021-2026) & (USD Million)

Table 65. World Ion Beam Etching Equipment Production Value by Ion Source (2027-2032) & (USD Million)

Table 66. World Ion Beam Etching Equipment Average Price by Ion Source (2021-2026) & (K US\$/Unit)

Table 67. World Ion Beam Etching Equipment Average Price by Ion Source (2027-2032) & (K US\$/Unit)

Table 68. World Ion Beam Etching Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Ion Beam Etching Equipment Production by Application (2021-2026) & (Units)

Table 70. World Ion Beam Etching Equipment Production by Application (2027-2032) & (Units)

Table 71. World Ion Beam Etching Equipment Production Value by Application (2021-2026) & (USD Million)

Table 72. World Ion Beam Etching Equipment Production Value by Application (2027-2032) & (USD Million)

Table 73. World Ion Beam Etching Equipment Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Ion Beam Etching Equipment Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Veeco Instruments Basic Information, Manufacturing Base and Competitors

Table 76. Veeco Instruments Major Business

Table 77. Veeco Instruments Ion Beam Etching Equipment Product and Services

Table 78. Veeco Instruments Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Veeco Instruments Recent Developments/Updates

Table 80. Veeco Instruments Competitive Strengths & Weaknesses

Table 81. Hitachi High-Tech Basic Information, Manufacturing Base and Competitors

Table 82. Hitachi High-Tech Major Business

Table 83. Hitachi High-Tech Ion Beam Etching Equipment Product and Services

Table 84. Hitachi High-Tech Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Hitachi High-Tech Recent Developments/Updates

Table 86. Hitachi High-Tech Competitive Strengths & Weaknesses

Table 87. Oxford Instruments Plasma Technology Basic Information, Manufacturing Base and Competitors

Table 88. Oxford Instruments Plasma Technology Major Business

Table 89. Oxford Instruments Plasma Technology Ion Beam Etching Equipment Product and Services

Table 90. Oxford Instruments Plasma Technology Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Oxford Instruments Plasma Technology Recent Developments/Updates

Table 92. Oxford Instruments Plasma Technology Competitive Strengths & Weaknesses

Table 93. Canon Anelva Corporation Basic Information, Manufacturing Base and Competitors

Table 94. Canon Anelva Corporation Major Business

Table 95. Canon Anelva Corporation Ion Beam Etching Equipment Product and Services

Table 96. Canon Anelva Corporation Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Canon Anelva Corporation Recent Developments/Updates

Table 98. Canon Anelva Corporation Competitive Strengths & Weaknesses

Table 99. Plasma-Therm Basic Information, Manufacturing Base and Competitors

Table 100. Plasma-Therm Major Business

Table 101. Plasma-Therm Ion Beam Etching Equipment Product and Services

Table 102. Plasma-Therm Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Plasma-Therm Recent Developments/Updates

Table 104. Plasma-Therm Competitive Strengths & Weaknesses

Table 105. SENTECH Instruments Basic Information, Manufacturing Base and Competitors

Table 106. SENTECH Instruments Major Business

Table 107. SENTECH Instruments Ion Beam Etching Equipment Product and Services

Table 108. SENTECH Instruments Ion Beam Etching Equipment Production (Units),

Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SENTECH Instruments Recent Developments/Updates

Table 110. SENTECH Instruments Competitive Strengths & Weaknesses

Table 111. Guoguang Liangchao Basic Information, Manufacturing Base and Competitors

Table 112. Guoguang Liangchao Major Business

Table 113. Guoguang Liangchao Ion Beam Etching Equipment Product and Services

Table 114. Guoguang Liangchao Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Guoguang Liangchao Recent Developments/Updates

Table 116. Guoguang Liangchao Competitive Strengths & Weaknesses

Table 117. Lam Research Basic Information, Manufacturing Base and Competitors

Table 118. Lam Research Major Business

Table 119. Lam Research Ion Beam Etching Equipment Product and Services

Table 120. Lam Research Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Lam Research Recent Developments/Updates

Table 122. Lam Research Competitive Strengths & Weaknesses

Table 123. Tokyo Electron Basic Information, Manufacturing Base and Competitors

Table 124. Tokyo Electron Major Business

Table 125. Tokyo Electron Ion Beam Etching Equipment Product and Services

Table 126. Tokyo Electron Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Tokyo Electron Recent Developments/Updates

Table 128. Tokyo Electron Competitive Strengths & Weaknesses

Table 129. Applied Materials Basic Information, Manufacturing Base and Competitors

Table 130. Applied Materials Major Business

Table 131. Applied Materials Ion Beam Etching Equipment Product and Services

Table 132. Applied Materials Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Applied Materials Recent Developments/Updates

Table 134. Applied Materials Competitive Strengths & Weaknesses

Table 135. Oxford Instruments Basic Information, Manufacturing Base and Competitors

Table 136. Oxford Instruments Major Business

Table 137. Oxford Instruments Ion Beam Etching Equipment Product and Services

Table 138. Oxford Instruments Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Oxford Instruments Recent Developments/Updates

Table 140. Oxford Instruments Competitive Strengths & Weaknesses

Table 141. AMEC (Advanced Micro-Fabrication Equipment Inc.) Basic Information, Manufacturing Base and Competitors

Table 142. AMEC (Advanced Micro-Fabrication Equipment Inc.) Major Business

Table 143. AMEC (Advanced Micro-Fabrication Equipment Inc.) Ion Beam Etching Equipment Product and Services

Table 144. AMEC (Advanced Micro-Fabrication Equipment Inc.) Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. AMEC (Advanced Micro-Fabrication Equipment Inc.) Recent Developments/Updates

Table 146. AMEC (Advanced Micro-Fabrication Equipment Inc.) Competitive Strengths & Weaknesses

Table 147. Northern Huachuang Basic Information, Manufacturing Base and Competitors

Table 148. Northern Huachuang Major Business

Table 149. Northern Huachuang Ion Beam Etching Equipment Product and Services

Table 150. Northern Huachuang Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Northern Huachuang Recent Developments/Updates

Table 152. Northern Huachuang Competitive Strengths & Weaknesses

Table 153. Beijing Advance Ion Beam Technology Institute Basic Information, Manufacturing Base and Competitors

Table 154. Beijing Advance Ion Beam Technology Institute Major Business

Table 155. Beijing Advance Ion Beam Technology Institute Ion Beam Etching Equipment Product and Services

Table 156. Beijing Advance Ion Beam Technology Institute Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Beijing Advance Ion Beam Technology Institute Recent Developments/Updates

Table 158. Beijing Advance Ion Beam Technology Institute Competitive Strengths & Weaknesses

Table 159. Zhongke Weishi (Beijing) Technology Development Basic Information, Manufacturing Base and Competitors

Table 160. Zhongke Weishi (Beijing) Technology Development Major Business

Table 161. Zhongke Weishi (Beijing) Technology Development Ion Beam Etching Equipment Product and Services

Table 162. Zhongke Weishi (Beijing) Technology Development Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Zhongke Weishi (Beijing) Technology Development Recent Developments/Updates

Table 164. Zhongke Weishi (Beijing) Technology Development Competitive Strengths & Weaknesses

Table 165. Beijing E-Town Semiconductor Technology Basic Information, Manufacturing Base and Competitors

Table 166. Beijing E-Town Semiconductor Technology Major Business

Table 167. Beijing E-Town Semiconductor Technology Ion Beam Etching Equipment Product and Services

Table 168. Beijing E-Town Semiconductor Technology Ion Beam Etching Equipment Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Beijing E-Town Semiconductor Technology Recent Developments/Updates

Table 170. Beijing E-Town Semiconductor Technology Competitive Strengths & Weaknesses

Table 171. Global Key Players of Ion Beam Etching Equipment Upstream (Raw Materials)

Table 172. Global Ion Beam Etching Equipment Typical Customers

Table 173. Ion Beam Etching Equipment Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Ion Beam Etching Equipment Picture

Figure 2. World Ion Beam Etching Equipment Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Ion Beam Etching Equipment Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Ion Beam Etching Equipment Production (2021-2032) & (Units)

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

Figure 6. World Ion Beam Etching Equipment Production Value Market Share by Region (2021-2032)

Figure 7. World Ion Beam Etching Equipment Production Market Share by Region (2021-2032)

Figure 8. North America Ion Beam Etching Equipment Production (2021-2032) & (Units)

Figure 9. Europe Ion Beam Etching Equipment Production (2021-2032) & (Units)

Figure 10. China Ion Beam Etching Equipment Production (2021-2032) & (Units)

Figure 11. Japan Ion Beam Etching Equipment Production (2021-2032) & (Units)

Figure 12. Ion Beam Etching Equipment Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 15. World Ion Beam Etching Equipment Consumption Market Share by Region (2021-2032)

Figure 16. United States Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 17. China Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 18. Europe Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 19. Japan Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 20. South Korea Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 21. ASEAN Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 22. India Ion Beam Etching Equipment Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Ion Beam Etching Equipment by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Ion Beam Etching Equipment Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Ion Beam Etching

## Equipment Markets in 2025

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

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

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

Figure 29. United States Based Manufacturers Ion Beam Etching Equipment Production Market Share 2025

Figure 30. China Based Manufacturers Ion Beam Etching Equipment Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Ion Beam Etching Equipment Production Market Share 2025

Figure 32. World Ion Beam Etching Equipment Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Ion Beam Etching Equipment Production Value Market Share by Type in 2025

Figure 34. Conventional Ion Beam Etching (IBE) Equipment

Figure 35. Reactive Ion Beam Etching (RIBE) Equipment

Figure 36. Ion Beam Assisted Etching/Deposition (IBAE/IBAD) Systems

Figure 37. World Ion Beam Etching Equipment Production Market Share by Type (2021-2032)

Figure 38. World Ion Beam Etching Equipment Production Value Market Share by Type (2021-2032)

Figure 39. World Ion Beam Etching Equipment Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Ion Beam Etching Equipment Production Value by Etching Accuracy, (USD Million), 2021 & 2025 & 2032

Figure 41. World Ion Beam Etching Equipment Production Value Market Share by Etching Accuracy in 2025

Figure 42. Error ? 0.1 ?

Figure 43. Error ? 1 nm

Figure 44. Error ? 1 ?m

Figure 45. World Ion Beam Etching Equipment Production Market Share by Etching Accuracy (2021-2032)

Figure 46. World Ion Beam Etching Equipment Production Value Market Share by Etching Accuracy (2021-2032)

Figure 47. World Ion Beam Etching Equipment Average Price by Etching Accuracy (2021-2032) & (K US\$/Unit)

Figure 48. World Ion Beam Etching Equipment Production Value by Ion Source, (USD Million), 2021 & 2025 & 2032

Figure 49. World Ion Beam Etching Equipment Production Value Market Share by Ion Source in 2025

Figure 50. Gallium Ion Source

Figure 51. Liquid Metal Ion Source

Figure 52. Gas Ion Source

Figure 53. World Ion Beam Etching Equipment Production Market Share by Ion Source (2021-2032)

Figure 54. World Ion Beam Etching Equipment Production Value Market Share by Ion Source (2021-2032)

Figure 55. World Ion Beam Etching Equipment Average Price by Ion Source (2021-2032) & (K US\$/Unit)

Figure 56. World Ion Beam Etching Equipment Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Ion Beam Etching Equipment Production Value Market Share by Application in 2025

Figure 58. Semiconductor Manufacturing

Figure 59. Research and Metrology

Figure 60. Aerospace

Figure 61. Other

Figure 62. World Ion Beam Etching Equipment Production Market Share by Application (2021-2032)

Figure 63. World Ion Beam Etching Equipment Production Value Market Share by Application (2021-2032)

Figure 64. World Ion Beam Etching Equipment Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 65. Ion Beam Etching Equipment Industry Chain

Figure 66. Ion Beam Etching Equipment Procurement Model

Figure 67. Ion Beam Etching Equipment Sales Model

Figure 68. Ion Beam Etching Equipment Sales Channels, Direct Sales, and Distribution

Figure 69. Methodology

Figure 70. Research Process and Data Source

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