

# Global Semiconductor Defect Inspection Systems Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Semiconductor Defect Inspection Systems market size is expected to reach \$ 19894 million by 2032, rising at a market growth of 9.6% CAGR during the forecast period (2026-2032).

Semiconductor metrology and inspection equipment runs through every process of wafer manufacturing, from design verification and process control inspection to wafer testing and final product testing. It plays a crucial role in controlling and improving the yield of wafer manufacturing. Based on the testing stages, semiconductor metrology and inspection can be divided into front-end inspection and back-end inspection. Front-end metrology and inspection occurs during wafer preparation and silicon wafer fabrication processes, including the measurement of dimensional parameters such as the thickness of various thin films formed during silicon wafer manufacturing, critical dimensions (CD) of nanostructures, and overlay errors, as well as the detection of surface defects on wafers, ensuring that the yield of the production line is controlled above the specified level. According to different functions, front-end metrology and inspection equipment is further classified into metrology equipment and defect inspection equipment. The former mainly targets thin film thickness, film stress, critical dimensions, doping concentration, etc., while the latter is mainly used for detecting surface defects on wafers, which is one of the keys to process control and yield management in semiconductor manufacturing.

The purpose of defect inspection is to accurately identify, locate, and classify Critical Defects (DOI, referring to any defect type deemed to affect yield, reliability, or performance) on the inspected wafers. This helps defect and yield engineers quickly resolve defect issues, which is of great significance for fabs to reduce production costs and improve wafer yield.

Major global manufacturers of semiconductor defect inspection systems include KLA, Applied Materials, ASML, Hitachi High-Tech, Onto Innovation, Camtek, SCREEN

Semiconductor Solutions, Lasertec, and Advantest. In 2024, the top ten manufacturers held approximately 93.2% of the global market share. Specifically, KLA and Applied Materials dominate the market for optical patterned wafer defect inspection equipment; KLA and Hitachi High-Tech dominate the market for patternless wafer defect inspection equipment; ASML, Hitachi High-Tech, and Applied Materials dominate the market for electron beam defect review/inspection equipment; Lasertec, KLA, Advantest, and NuFlare dominate the market for mask defect inspection equipment. The demand for semiconductor defect inspection systems is deeply integrated with and closely linked to the overall development of the semiconductor industry. After a period of phased adjustment, the global semiconductor industry ushered in strong recovery and growth in 2025, with the market volume expanding continuously, which has driven robust demand for defect inspection systems. According to the latest autumn 2025 forecast from the World Semiconductor Trade Statistics (WSTS) organization, driven by the strong performance of logic chips and memory chips, the global semiconductor market is expected to achieve a year-on-year growth of 22.5% in 2025, reaching 772.2 billion US dollars—an upward revision of nearly 45 billion US dollars from the first-half forecast. The growth momentum is mainly driven by the continuous explosive demand for AI-related applications and data center infrastructure. Synchronized data from the Semiconductor Industry Association (SIA) shows that the industry growth presents distinct structural characteristics: logic chips and memory chips lead the way with year-on-year growth rates of 37% and 28% respectively, while categories such as sensors and microprocessors have also achieved steady recovery. Looking ahead, WSTS predicts that the global semiconductor market will maintain a high-growth trend in 2026, with a potential year-on-year growth rate of 26.3%, pushing the market scale to nearly 976 billion US dollars and moving towards the trillion-dollar mark. As the semiconductor industry continues to expand, coupled with the increasing penetration of advanced processes such as 3nm and below, as well as advanced packaging technologies like Chiplet, the demand for higher precision, efficiency, and intelligence in defect inspection during wafer manufacturing will further escalate. In particular, front-end wafer inspection equipment, as the core of yield control, will see a surge in market size driven by rising demand. It will continue to benefit from industry growth dividends in the future, driving the steady growth of demand for wafer defect inspection systems. This report studies the global Semiconductor Defect Inspection Systems production, demand, key manufacturers, and key regions. This report is a detailed and comprehensive analysis of the world market for Semiconductor Defect Inspection Systems 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 Semiconductor Defect Inspection Systems that contribute to its increasing demand across many

markets.

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

Global Semiconductor Defect Inspection Systems total production and demand, 2021-2032, (Units)

Global Semiconductor Defect Inspection Systems total production value, 2021-2032, (USD Million)

Global Semiconductor Defect Inspection Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Semiconductor Defect Inspection Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Semiconductor Defect Inspection Systems domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Defect Inspection Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Semiconductor Defect Inspection Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Semiconductor Defect Inspection Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Semiconductor Defect Inspection Systems 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 KLA Corporation, Applied Materials, Lasertec, Hitachi High-Tech Corporation, ASML, Onto Innovation, Camtek, SCREEN Semiconductor Solutions, Skyverse Technology, Toray Engineering, 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 Semiconductor Defect Inspection Systems 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 Semiconductor Defect Inspection Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Semiconductor Defect Inspection Systems Market, Segmentation by Type:

Mask Defect Inspection Equipment

Unpatterned Wafer Defect Inspection Equipment

Patterned Wafer Defect Inspection Equipment

Electron Beam Defect Inspection and Review Equipment

X-ray Defect Inspection Equipment

#### Global Semiconductor Defect Inspection Systems Market, Segmentation by Technology:

Optical Defect Inspection

Electron Beam Defect Inspection

X-ray Defect Inspection

#### Global Semiconductor Defect Inspection Systems Market, Segmentation by Application:

Wafer Defect Inspection

Mask Defect Inspection

### **Companies Profiled:**

KLA Corporation

Applied Materials

Lasertec

Hitachi High-Tech Corporation

ASML

Onto Innovation

Camtek

SCREEN Semiconductor Solutions

Skyverse Technology

Toray Engineering

NEXTIN

Advantest

Holon Co., Ltd

Suzhou TZTEK (Muetec)

NuFlare

Microtronic

Bruker

SMEE

Hangzhou Changchuan Technology

Wuhan Jingce Electronic Group

Angkun Vision (Beijing) Technology

Nanotronics

Visiontec Group

Hefei Yuwei Semiconductor Technology

Suzhou Secote (Optima)

DJEL

Jiangsu VPTEK

Ever Red New Technology

Confovis

Zhongdao Optoelectronic

Suzhou Xinshi Technology

RSIC scientific instrument (Shanghai)

Gaoshi Technology (Suzhou)

Unity Semiconductor SAS

JUTZE Intelligence Technology

Chroma ATE Inc

CMIT

Engitist Corporation

HYE Technology

Shuztung Group

Cortex Robotics

Takano

Shanghai Techsense

**Key Questions Answered:**

1. How big is the global Semiconductor Defect Inspection Systems market?
2. What is the demand of the global Semiconductor Defect Inspection Systems market?
3. What is the year over year growth of the global Semiconductor Defect Inspection Systems market?
4. What is the production and production value of the global Semiconductor Defect Inspection Systems market?
5. Who are the key producers in the global Semiconductor Defect Inspection Systems market?
6. What are the growth factors driving the market demand?

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