

Global Semiconductor Electron Microscopes Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Electron Microscopes market size is expected to reach \$ 4213 million by 2032, rising at a market growth of 11.5% CAGR during the forecast period (2026-2032).

Semiconductor Electron Microscopes are scientific instruments ultimately used for technology research, process development, reference metrology, yield learning, manufacturing support, physical failure analysis and reliability assessment of semiconductor materials, wafers, dies, devices and packaging structures. They use focused electron beams or combined ion-beam and electron-beam systems for micro- and nanoscale imaging, localized material processing and physicochemical characterization. Under the scope adopted in this report, Semiconductor Electron Microscopes comprise three categories: Semiconductor FIB-SEM, Semiconductor SEM and Semiconductor TEM. A FIB-SEM uses a focused ion beam for site-specific milling, delayering, cross-sectioning and TEM lamella preparation while an SEM column simultaneously images the processed region. An SEM collects secondary electrons, backscattered electrons, characteristic X-rays, cathodoluminescence or voltage-contrast signals to analyze surfaces, cross sections, particles, contamination and device structures. A TEM or STEM transmits high-energy electrons through an electron-transparent lamella to characterize crystal lattices, interfaces, crystallographic defects, strain, elemental distributions and chemical states at higher spatial resolution. Market revenue includes semiconductor-dedicated instruments and the portion of general-purpose platforms actually sold to wafer fabs, IDMs, OSAT companies, fabless companies with internal laboratories, semiconductor research institutes and third-party failure-analysis laboratories. Instruments used in life sciences, general materials science, geology and education are excluded, as are electron beam lithography systems, EBI, DR-SEM, CD-SEM and Massive E-beam Metrology systems that are

counted in separate product markets. Hitachi High-Tech similarly positions FE-SEM, FIB-SEM and TEM systems across semiconductor device development, manufacturing support, failure analysis and quality assurance, supporting this three-category market boundary.

Semiconductor FIB-SEM products primarily comprise high-precision gallium-ion FIB-SEMs, high-throughput xenon-plasma PFIB-SEMs and integrated systems incorporating femtosecond lasers, low-energy argon-ion cleaning or electrical nanoprobng. Major applications include site-specific device cross-sectioning, delayering, exposure of failure locations, TEM lamella preparation, serial-section three-dimensional reconstruction, large-volume package milling and localized electrical analysis. Gallium FIB is generally suited to high-precision processing and lamella fabrication, whereas xenon PFIB is increasingly used for high-volume removal in advanced packaging, HBM and large three-dimensional structures. Semiconductor SEM products include ultra-high-resolution cold-field-emission or Schottky FE-SEMs, standard analytical FE-SEMs, conventional tungsten or LaB₆ systems and compact or tabletop SEMs. They are used for wafer and die morphology, device cross sections, particle and contamination analysis, thin-film and material composition, EBSD orientation analysis, cathodoluminescence and voltage-contrast failure localization. Semiconductor TEM products include semiconductor-dedicated automated S/TEM systems, aberration-corrected atomic-resolution TEM/STEM platforms, general-purpose analytical FE-TEM/STEM systems and conventional or compact low-voltage TEMs. Their applications cover lattice, strain, dislocation, interface and elemental-distribution analysis in advanced logic, DRAM, 3D NAND, HBM, interconnects, hybrid bonding and SiC or GaN devices. The three product categories form a sequential and complementary workflow: SEM provides rapid screening over relatively broad areas; FIB-SEM accesses buried structures and prepares targeted cross sections or lamellae; and TEM/STEM performs the highest-resolution reference analysis. Official product and application materials from Thermo Fisher Scientific, ZEISS, Hitachi High-Tech, JEOL and TESCAN consistently identify site-specific cross-sectioning, TEM sample preparation, three-dimensional characterization, failure analysis, process characterization and reference metrology as core semiconductor applications.

In Semiconductor SEM, Hitachi High-Tech, ZEISS and Thermo Fisher Scientific held 2025 shares of 30.77%, 29.07% and 23.67%, respectively, giving the top three suppliers a combined share of 83.51%. ZEISS gained 4.24 percentage points from 2021, while Hitachi and Thermo Fisher declined by 4.04 and 5.63 percentage points, indicating a transition from a traditional two-company structure toward more balanced competition among three leading suppliers. TESCAN represented 3.56%, while Raith

and JEOL held 2.05% and 2.33%, respectively. The combined share of mainland Chinese SEM suppliers increased from approximately 1.30% in 2021 to approximately 5.79% in 2025, indicating that domestic SEM commercialization has entered a broader adoption stage. Semiconductor TEM is substantially more concentrated: Thermo Fisher held 86.17%, Hitachi 7.16% and JEOL 4.25%, producing a CR3 of 97.58%. Thermo Fisher maintains its dominant position through semiconductor-dedicated automated S/TEM instruments such as Metrios and an integrated workflow connecting FIB sample preparation with TEM metrology. TESCAN increased from no measurable share in 2021 to 1.74% in 2025 but has not yet materially altered the market structure. In Semiconductor FIB-SEM, Thermo Fisher remained the leader with 58.42%, although its share declined by 8.18 percentage points from 2021. TESCAN increased from 7.99% to 13.51% and became the second-largest supplier, followed by ZEISS at 10.59%; the top three represented 82.52%, and the top five including Hitachi and JEOL accounted for 95.92%. Thermo Fisher is the only supplier holding a global leading position across all three categories. Hitachi and JEOL maintain portfolios spanning FIB-SEM, SEM and TEM; ZEISS is particularly strong in SEM and FIB-SEM; and TESCAN is expanding rapidly through FIB-SEM while entering TEM. Because the three categories differ significantly in total market size and average selling price, an overall Semiconductor Electron Microscope supplier share must be calculated by revenue-weighting the individual FIB-SEM, SEM and TEM markets rather than by averaging the three share tables. Current product development from Thermo Fisher, ZEISS and TESCAN also indicates that competition is shifting from resolution alone toward sample-preparation throughput, measurement repeatability, software automation and integrated cross-tool workflows.

Future development of Semiconductor Electron Microscopes will emphasize automation and unattended operation, multimodal analysis, low-damage processing, high-throughput specimen preparation, three-dimensional characterization and integrated laboratory workflows. In FIB-SEM, automated navigation, machine-learning-based endpoint detection, automated lift-out and thinning, batch TEM sample preparation, and combinations of Ga FIB, Xe PFIB, femtosecond laser ablation and low-energy argon-ion finishing will become increasingly important for advanced packaging, chiplets, HBM and three-dimensional devices with large material volumes, deeply buried structures and difficult-to-access regions of interest. Thermo Fisher's Helios 6 HX incorporates automated navigation and machine-learning-assisted endpoint control; the ZEISS Crossbeam 550 Samplefab provides a fully automated workflow from bulk sample to thinned lamella; and the TESCAN SOLARIS 2 positions automated TEM lamella preparation as a core capability for semiconductor failure analysis and quality control. In SEM, high-brightness field-emission sources, ultra-low landing-energy imaging, multiple

detectors, automated EDS and EBSD, machine-learning image segmentation and automatic dimensional analysis will improve productivity for insulating materials, low-contrast films and complex three-dimensional structures. In TEM/STEM, automated loading and navigation, autofocus and aberration correction, direct electron detectors, large-solid-angle EDS, EELS, electron tomography and 4D-STEM will increasingly migrate from specialized research into routine advanced-process reference metrology. Demand is being driven by logic technologies at 2 nm and below, GAA transistors, backside power delivery, advanced DRAM and HBM, higher-layer-count 3D NAND, hybrid bonding, chiplets and SiC or GaN devices. According to SEMI's July 2026 forecast, worldwide semiconductor manufacturing equipment sales are expected to increase from USD135.1 billion in 2025 to USD165.9 billion in 2026 and reach USD229.5 billion in 2028. Foundry and logic equipment sales are projected to reach USD78.0 billion in 2026, while DRAM and NAND equipment sales are expected to reach USD38.8 billion and USD13.9 billion, respectively. Expansion in advanced nodes, AI processors and high-bandwidth memory will increase demand intensity for structural characterization, TEM reference metrology, physical failure analysis and advanced-packaging cross-section analysis. High equipment and facility costs, lengthy specimen-preparation cycles, limited analytical areas, electron- and ion-beam damage, rapidly expanding data volumes, shortages of experienced operators and constraints in high-end electron optics and critical components will remain the principal barriers to broader adoption.

Report Scope

This report studies the global Semiconductor Electron Microscopes production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Electron Microscopes 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 Electron Microscopes that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Electron Microscopes total production and demand,
2021-2032, (Units)

Global Semiconductor Electron Microscopes total production value, 2021-2032, (USD Million)

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

Global Semiconductor Electron Microscopes consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Semiconductor Electron Microscopes domestic production, consumption, key domestic manufacturers and share

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

Global Semiconductor Electron Microscopes production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Semiconductor Electron Microscopes production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Semiconductor Electron Microscopes 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 Thermo Fisher Scientific (FEI), Hitachi High-Tech, Zeiss, Applied Materials, Raith, JEOL, TESCAN, Delong Instruments, Coxem, Voxa, 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 Electron Microscopes market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 Electron Microscopes Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Semiconductor Electron Microscopes Market, Segmentation by Type:

Semiconductor FIB-SEM

Semiconductor SEM

Semiconductor TEM

Global Semiconductor Electron Microscopes Market, Segmentation by Electron Source Type:

Thermionic Emission Electron Microscopes

Schottky Field Emission Electron Microscopes

Cold Field Emission Electron Microscopes

Global Semiconductor Electron Microscopes Market, Segmentation by Application:

IDM and Foundries

Fabless Semiconductor Companies

OSAT and Advanced Packaging

Semiconductor Equipment and Materials Suppliers

Research Institutes and Universities

Third-Party Failure Analysis and Testing Laboratories

Companies Profiled:

Thermo Fisher Scientific (FEI)

Hitachi High-Tech

Zeiss

Applied Materials

Raith

JEOL

TESCAN

Delong Instruments

Coxem

Voxa

Attolight

Semplor

SEC Co.,Ltd

Hirox

EmCrafts

TEMIC

Shanghai Precision Measurement Semiconductor Technology (PMISH)

CIQTEK

Yidon Technologies

NCS Microbeams

Ningbo Bio-eBeam Electron Beam Technology

Motic

ZEPTOOLS

Suzhou BOZHON Instruments Technology

Shenzhen Shanshi Instrument

Huiran Microelectronics Technology

KYKY

Key Questions Answered

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

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