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Global SiC Basal-Plane-Dislocation Inspection System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global SiC Basal-Plane-Dislocation Inspection System market size is expected to reach $ 310 million by 2032, rising at a market growth of 12.9% CAGR during the forecast period (2026-2032).

The SiC Basal-Plane-Dislocation Inspection System market covers specialized semiconductor inspection equipment used to detect, identify, classify, locate, map and quantify basal plane dislocations in silicon carbide substrates, polished wafers, epitaxial wafers and wafer states associated with device reliability evaluation. The principal commercial configurations include photoluminescence-based wafer inspection systems using ultraviolet or near-ultraviolet excitation, X-ray topography and X-ray diffraction imaging platforms, automated optical inspection systems for chemically revealed dislocations, electron-based inspection platforms, nonlinear or transient optical inspection systems, and emerging defect-activation systems designed to visualize BPD-related reliability risks. Production-oriented systems typically integrate precision wafer handling, excitation and detection modules, automated defect classification, full-wafer mapping, recipe management and factory automation interfaces. Their principal applications extend from SiC crystal and substrate development to substrate outgoing quality control, incoming wafer inspection, epitaxial process monitoring, device manufacturing process control and reliability evaluation. The market increasingly emphasizes non-destructive inspection, repeatable BPD classification, wafer-level mapping, high throughput and compatibility with 150 mm and 200 mm SiC manufacturing, while selected advanced platforms are extending support toward larger wafer formats and fab-level automation.

Key Findings

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In 2025, global SiC Basal-Plane-Dislocation Inspection System production reached approximately 135 Units.The average price is approximately $940,000

PL/UV-PL and X-ray topography are the leading non-destructive routes, while etched-wafer AOI retains a role in selected workflows

Japan has the deepest mature supplier base, while China has the fastest-expanding pool of domestic SiC BPD inspection equipment entrants

Market Trends

The SiC Basal-Plane-Dislocation Inspection System industry is shifting from laboratory-oriented defect characterization toward automated production process control. The most important product transition is from destructive or offline inspection toward non-destructive full-wafer measurement, higher throughput and automatic defect classification. Modern PL platforms increasingly combine surface inspection, photoluminescence inspection, high-resolution review and algorithm-based classification within one tool, enabling the same platform to support incoming and outgoing wafer inspection as well as epitaxial and polishing process monitoring. X-ray topography is also moving from research laboratories toward near-fab and fully automated fab configurations, with current production platforms supporting wafer automation, defect mapping, standardized reporting and wafers up to 300 mm. A second important direction is the expansion of BPD inspection from identifying existing crystallographic defects toward evaluating latent reliability risks. Newly introduced UV-laser-based approaches can intentionally expand and visualize latent BPD-related defects at wafer level, strengthening the connection between material inspection, process optimization and device reliability engineering.

Market Dynamics

Drivers

Growth in the SiC Basal-Plane-Dislocation Inspection System market is primarily supported by increasing requirements for wafer quality, device yield and long-term reliability as SiC manufacturing scales. BPDs are technically important because their presence and subsequent defect evolution can affect the performance and reliability of power semiconductor devices, increasing the economic value of identifying problematic material before additional epitaxy and device-processing costs are incurred. The

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transition toward higher-volume 200 mm manufacturing further raises the value at risk per wafer and encourages more intensive inspection at substrate outgoing QC, incoming wafer QC and epitaxial process-control stages. At the equipment level, improvements in inspection speed, automatic defect classification, full-wafer mapping and fab automation are reducing the operational burden of crystallographic defect inspection and making these tools more suitable for production environments rather than laboratory use alone. The broader adoption of SiC devices in automotive power electronics, industrial power conversion, renewable-energy systems and other high-efficiency applications consequently provides an underlying demand base for increasingly rigorous crystal-defect management.

Restraints

The market remains constrained by its highly specialized application scope and relatively high equipment cost. BPD inspection represents only one component of the broader SiC wafer inspection and metrology workflow, and customers may favor multifunction platforms capable of detecting several defect classes simultaneously rather than purchasing equipment dedicated to a single defect mechanism. Different inspection technologies also produce different signal characteristics, detection sensitivities and classification results, making direct tool-to-tool comparison difficult and increasing qualification requirements at customer fabs. Production-level X-ray, high-sensitivity PL and other advanced systems require sophisticated optics, detectors, wafer handling, software and defect-analysis algorithms, which limit the number of qualified suppliers and increase system ASP. In addition, SiC capital expenditure remains cyclical. Periods of slower substrate capacity expansion, inventory correction or delayed 200 mm production ramps can postpone equipment purchases even when the underlying technical need for BPD inspection remains unchanged.

Opportunities

The largest opportunities are associated with 200 mm production expansion, non-destructive replacement of selected destructive inspection workflows and the integration of BPD information with downstream electrical and reliability data. Equipment capable of combining high-throughput wafer mapping with automated classification can move further upstream into substrate outgoing QC and further downstream into epitaxial and device-process monitoring, increasing the number of inspection points per wafer. Another emerging opportunity is latent-defect and reliability-oriented inspection. In 2026, Tokyo Electron Device and ITES announced the ITS-SCX100, which uses UV-laser

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irradiation to expand and visualize latent BPDs across SiC wafers and is designed to shorten evaluation cycles associated with current-stress degradation. This illustrates a broader opportunity for inspection suppliers to move beyond defect counting toward correlation of wafer maps with electrical characteristics, process conditions and reliability outcomes. China also offers a structural opportunity as domestic SiC substrate, epitaxy and device capacity expands and local equipment suppliers advance from laboratory prototypes to customer validation and commercial deployment.

Challenges

The principal challenge is converting strong laboratory defect-detection capability into repeatable high-volume manufacturing performance. BPD signals can vary with wafer condition, epitaxial structure, preparation method and inspection physics, so suppliers must demonstrate stable detection sensitivity, low false-positive and false-negative rates, accurate classification and consistent wafer-to-wafer repeatability. Customers increasingly expect systems to integrate with automated material handling, production databases and fab communication protocols while maintaining acceptable throughput and cost of ownership. Competition between PL, X-ray, etched-wafer optical inspection and emerging nonlinear or transient optical methods also creates technology-selection uncertainty, particularly because no single route optimizes sensitivity, throughput, non-destructive operation, subsurface information and equipment cost simultaneously. Finally, the relatively limited absolute size of this specialized market can make sustained R&D investment difficult for smaller suppliers, increasing the importance of adjacent SiC inspection applications, customer partnerships and broader compound-semiconductor equipment portfolios.

Industry Chain Analysis

The upstream portion of the SiC Basal-Plane-Dislocation Inspection System industry includes optical excitation sources, lasers, X-ray sources and optics, high-sensitivity cameras and detectors, spectrometers, precision motion stages, wafer handling modules, control electronics, industrial computers and image-processing software. The technical performance of these components directly affects detection sensitivity, spatial resolution, throughput and tool stability. Specialized defect-classification algorithms and wafer-mapping software are increasingly important sources of value because a commercially useful system must distinguish BPDs from TSD, TED, stacking faults, micropipes and other crystallographic or surface defects rather than merely generate an

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image. In the midstream, equipment manufacturers integrate these hardware and software components into laboratory, near-fab or automated production platforms and undertake calibration, recipe development, defect correlation, application engineering and customer qualification.

Downstream customers are primarily SiC crystal and substrate manufacturers, epitaxial wafer producers, power semiconductor manufacturers, integrated device manufacturers and specialized R&D or reliability laboratories. Value creation progressively shifts from hardware assembly toward application knowledge as the equipment moves closer to production. The ability to correlate BPD maps with crystal-growth conditions, polishing processes, epitaxy results, device yield and reliability performance can create substantial customer switching costs and recurring software, service and application-support value. High-end non-destructive systems generally command higher pricing because of their sophisticated excitation/detection architecture and automation, while etched-wafer AOI can provide a lower-cost route for specific quality-control workflows.

Segment Insights

By inspection technology, photoluminescence and X-ray topography represent the most established non-destructive segments for production-oriented BPD inspection. PL systems benefit from relatively high scanning speed and the ability to combine BPD or stacking-fault inspection with other optical defect channels, making them particularly suitable for substrate and epitaxial wafer quality control. Current production platforms increasingly integrate high-resolution review and automatic defect classification, improving their value as multifunction SiC inspection tools. X-ray topography provides a complementary advantage because it directly probes crystallographic structure without destructive sample preparation and can map BPD and other dislocations through the wafer. Rigaku's current systems span laboratory, near-fab and fab configurations and support automated BPD/TSD mapping and production-oriented workflows.

Etch-reveal AOI remains commercially relevant where direct visualization of dislocation etch pits, comparatively lower system cost or established correlation with historical quality metrics is required. Electron-based, nonlinear optical and transient optical approaches represent smaller but strategically important segments because they may offer differentiated sensitivity or non-destructive capability. Over the forecast period, the product mix is expected to gradually favor automated non-destructive platforms, while destructive or post-etch inspection remains important for reference measurement, process development and selected cost-sensitive applications.

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Downstream Market Opportunities

The most attractive downstream opportunity lies in embedding BPD inspection more deeply into the SiC manufacturing flow rather than limiting it to occasional material characterization. Substrate manufacturers can use full-wafer BPD mapping to optimize crystal growth, wafer selection and outgoing quality control, while epitaxy suppliers and device manufacturers can use incoming inspection and process monitoring to identify high-risk wafers before substantial downstream value is added. Lasertec's current SiC inspection platform, for example, positions BPD/SF inspection across bare-wafer and epitaxial-wafer incoming and outgoing inspection as well as epitaxy, polishing and device-manufacturing process management, illustrating the widening production use case. Reliability-oriented applications offer an additional growth layer as device manufacturers seek to connect crystallographic defect distributions with electrical degradation and long-term field performance, particularly for automotive and industrial power devices where qualification requirements are stringent.

Regional Insights

Japan currently represents the most developed supplier cluster for SiC Basal-Plane-Dislocation Inspection System technologies, supported by a broad combination of semiconductor inspection, optical instrumentation, X-ray metrology and compound-semiconductor process expertise. The region contains several established suppliers across PL, X-ray, electron-based and emerging reliability-inspection routes, giving Japanese vendors particularly broad technology coverage. North America represents another important high-value market and supplier base, characterized by large process-control and analytical-instrument companies with global customer networks. Europe has strong underlying expertise in X-ray and optical characterization but a smaller number of dedicated commercial BPD inspection system suppliers, while Taiwan and Southeast Asia are represented primarily by specialized equipment vendors.

China is the most dynamic region in terms of new domestic supplier formation. Local equipment companies are increasingly developing SiC PL inspection, etched-wafer AOI, automated defect classification and alternative optical techniques as domestic substrate, epitaxy and power-device investment expands. The current gap with leading international suppliers is more evident in global installed base, long-term process correlation and extensive production validation than in the breadth of technical routes being explored. South Korea retains important compound-semiconductor inspection expertise, although industry consolidation has changed the independent supplier

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structure: HORIBA completed its acquisition of EtaMax in April 2025 to strengthen wafer inspection capabilities for next-generation power semiconductors.

Competitive Landscape Analysis

The SiC Basal-Plane-Dislocation Inspection System market has a relatively concentrated core of established production-equipment suppliers surrounded by a broader group of specialized and emerging vendors. Lasertec, KLA, Rigaku, Toray Engineering/TASMIT, Onto Innovation and other established semiconductor inspection and metrology companies compete primarily through detection performance, throughput, production automation, installed base and integration with customer process-control workflows. Specialist suppliers differentiate through particular physical approaches, including X-ray diffraction imaging, nonlinear optics, etched-wafer automatic inspection and other BPD-sensitive techniques. The competitive structure is therefore technology-diverse rather than dominated by a single standardized architecture. Product development is increasingly focused on simultaneous multi-defect inspection, automatic defect classification, higher throughput, 200 mm production readiness and stronger linkage between wafer-level defect data and device reliability. Industry consolidation is also beginning to reshape the supplier landscape: HORIBA's 2025 acquisition of EtaMax brought an independent Korean wafer inspection equipment developer into a larger global instrumentation group, with HORIBA targeting expansion of its next-generation power-semiconductor wafer inspection business. At the same time, the expanding Chinese equipment pool is increasing competition in local customer qualification, pricing and application customization, while established international suppliers continue to hold advantages in installed base, long-term defect databases and global service capability.

Report Scope

This report studies the global SiC Basal-Plane-Dislocation Inspection System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for SiC Basal-Plane-Dislocation Inspection System 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 SiC Basal-Plane-Dislocation Inspection System that contribute to its increasing demand across

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many markets.

Highlights and key features of the study

Global SiC Basal-Plane-Dislocation Inspection System total production and demand, 2021-2032, (Units)

Global SiC Basal-Plane-Dislocation Inspection System total production value, 2021-2032, (USD Million)

Global SiC Basal-Plane-Dislocation Inspection System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global SiC Basal-Plane-Dislocation Inspection System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: SiC Basal-Plane-Dislocation Inspection System domestic production, consumption, key domestic manufacturers and share

Global SiC Basal-Plane-Dislocation Inspection System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global SiC Basal-Plane-Dislocation Inspection System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global SiC Basal-Plane-Dislocation Inspection System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global SiC Basal-Plane-Dislocation Inspection System 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 Lasertec Corporation, KLA Corporation, Rigaku Holdings Corporation, Toray Engineering, Onto Innovation, Hitachi High-Tech, Bruker, HORIBA, AK Optics, Spirox, etc.

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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 SiC Basal-Plane-Dislocation Inspection System 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 SiC Basal-Plane-Dislocation Inspection System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

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Global SiC Basal-Plane-Dislocation Inspection System Market, Segmentation by Type:

Photoluminescence Inspection

X-ray Topography

Etch-Reveal Optical Inspection

Electron-based Inspection

Others

Global SiC Basal-Plane-Dislocation Inspection System Market, Segmentation by Primary Inspection Function:

BPD Detection

BPD Classification

BPD Mapping

BPD Density Quantification

Others

Global SiC Basal-Plane-Dislocation Inspection System Market, Segmentation by Wafer Size Support:

Up to 100 mm

150 mm Class

200 mm Class

300 mm-capable

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Others

Global SiC Basal-Plane-Dislocation Inspection System Market, Segmentation by Application:

Substrate R&D

Substrate Outgoing QC

Incoming Wafer QC

Others

Companies Profiled:

Lasertec Corporation

KLA Corporation

Rigaku Holdings Corporation

Toray Engineering

Onto Innovation

Hitachi High-Tech

Bruker

HORIBA

AK Optics

Spirox

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Nanotronics

Avant Semiconductor

CETC Fenghua

Time Tech Spectra

uInspect

Intego

Zhejiang Shuangyuan

Tokyo Electron Device

ITES

Key Questions Answered

1. How big is the global SiC Basal-Plane-Dislocation Inspection System market?
2. What is the demand of the global SiC Basal-Plane-Dislocation Inspection System market?
3. What is the year over year growth of the global SiC Basal-Plane-Dislocation Inspection System market?
4. What is the total value of the global SiC Basal-Plane-Dislocation Inspection System market?
5. Who are the Major Players in the global SiC Basal-Plane-Dislocation Inspection System market?
6. What are the growth factors driving the market demand?

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