

# Global SiC & GaN Wafer Defect Inspection System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global SiC & GaN Wafer Defect Inspection System market size was valued at US\$ 986 million in 2025 and is forecast to a readjusted size of US\$ 3087 million by 2032 with a CAGR of 17.9% during review period.

The SiC & GaN Wafer Defect Inspection System industry is a narrowly defined segment of semiconductor metrology that covers only wafer-level defect inspection systems dedicated to silicon carbide (SiC) and gallium nitride (GaN) wafers across three process stages: SiC substrate, SiC epitaxy and SiC devices; GaN substrate, GaN epitaxy and GaN devices. In statistical terms, this segment includes automated tools that perform full-wafer or high-coverage defect detection and mapping on 100-200 mm SiC and GaN wafers used in power, RF and optoelectronic devices, but excludes generic silicon-only inspection tools and back-end/packaging inspection. Representative systems are explicitly marketed for SiC/GaN wafer defect inspection. KLA's Candela 8520 is an integrated surface- and photoluminescence-inspection platform for SiC and GaN substrates and epitaxial wafers, detecting particles, scratches, cracks, stains, pits, carrots, basal-plane dislocations (BPDs), micropipes, stacking faults, grain boundaries and threading dislocations up to 200 mm diameter. Lasertec's SICA88 and next-generation SICA108 are SiC-only wafer inspection and review systems that integrate surface scatter and PL channels in a single tool to concurrently inspect and classify surface and crystallographic defects on SiC substrates and epi wafers. Onto Innovation's Celero PL system is designed specifically for subsurface and crystalline defect inspection and classification in SiC and GaN wafers, using a laser-based phase-detection PL architecture to meet growing demand from power-device and compound-semiconductor lines. On the X-ray side, Rigaku's XRTmicron and XRTmicron Near-Fab

systems provide fast, high-resolution X-ray topography for non-destructive imaging and mapping of dislocations, stacking faults, micropipes and grain boundaries in single-crystal wafers including SiC and GaN, bridging the gap between lab characterization and fab-compatible inspection.

Technically, these SiC & GaN wafer defect inspection systems combine several complementary modalities optimized for WBG materials and the six defined applications (SiC/GaN substrate, epi and devices). At the substrate and epitaxy stages, tool design is dominated by wide-field optical inspection with integrated photoluminescence (PL) and X-ray diffraction imaging/topography (XRDI/XRT). The latest PL systems illuminate SiC or GaN wafers with UV/blue lasers and capture variations in PL intensity and lifetime to map micropipes, BPDs, stacking faults and threading dislocations, while simultaneously using dark-field/bright-field scatter channels to capture surface defects such as pits, carrots and scratches?this is explicit in Candela 8520 and SICA88/108 datasheets. XRDI/XRT systems such as XRTmicron exploit diffraction contrast rather than absorption to produce full-wafer images of dislocation networks and grain boundaries, and are increasingly offered in ?Near-Fab? configurations with automated wafer handling for routine SiC/GaN substrate and epi-wafer qualification. At the device stage, the same WBG wafers are inspected by a mix of patterned-wafer optical defect tools and electron-beam systems (bright-field/dark-field optical, e-beam inspection, review SEM/CD-SEM, CL-SEM) that focus on lithography, etch and metallization defects but are tuned for the thicker, high-voltage SiC/GaN device topographies; these are not always branded as ?SiC/GaN-only?, but in this industry definition they are counted only when configured and deployed on SiC or GaN device lines. Complementary lab-scale methods such as optical microscopy/DIC, AFM and various failure-analysis techniques are essential for understanding defect physics and validating inline methods, but in market statistics they usually form a smaller, supporting share compared with high-throughput PL/XRT systems.

Viewed under this narrow SiC/GaN scope, the SiC & GaN Wafer Defect Inspection System market is already a sizable and fast-growing niche within semiconductor metrology. Dedicated market studies for metrology and inspection equipment serving SiC and GaN estimate a market value of roughly US\$ 958 million in 2025 with a ~18.34 % CAGR out to 2031, reflecting the combined spend on PL wafer inspectors, X-ray topography tools and related WBG-focused inspection/metrology platforms. This growth rate is several times higher than the broader wafer-inspection and semiconductor-metrology equipment markets, which are typically forecast in the mid-single-digit to high-single-digit CAGR range over similar horizons. The installed base is dominated by a small group of specialists: KLA (Candela series) for SiC/GaN substrate and epi

PL/surface inspection; Lasertec (SICA88/SICA108) for SiC wafer inspection and review; Onto Innovation (Celero PL and compound-semi inspection portfolio) for subsurface and crystalline-defect mapping on SiC and GaN wafers; and Rigaku (XRTmicron family) for production-oriented X-ray topography on SiC and GaN substrates. Adoption is already broad among leading SiC substrate and epi suppliers and is spreading down the value chain into power-device fabs and GaN-device manufacturers, driven by the need to screen crystal and process defects that can trigger premature breakdown, current collapse or long-term reliability issues.

Looking ahead, the segment is shaped by a tension between rapid demand growth and significant technical/economic barriers. On the demand side, the ramp of EV traction inverters and onboard chargers, renewable-energy and grid-tied inverters, industrial motor drives, data-center power supplies and 5G/RF infrastructure is pushing SiC and GaN device shipments upward, and each incremental wafer start requires tighter control of BPDs, stacking faults, threading dislocations and surface defects?directly pulling through more PL/XRT capacity and more advanced inspection algorithms. On the technology side, vendors are moving from simple 2D surface/PL maps to subsurface and quasi-3D PL inspection, as exemplified by Celero PL and high-speed PL scanners, and from lab-only X-ray topography to Near-Fab automated XRT configurations, while increasingly embedding deep-learning-based defect classification and analytics in tools like Lasertec?s SICA108. Key drivers therefore include: the steep growth of SiC/GaN power markets, stricter automotive-grade quality and reliability standards, the migration to 200 mm SiC wafers, and OEM/IDM efforts to reduce scrap and energy use in support of broader sustainability goals. Counterbalancing this, the industry faces high tool cost and cost-of-ownership, limited throughput for XRT/XRDI relative to optical PL systems, a shortage of experienced WBG-materials engineers, and the still-immature state of standardized, fab-wide flows that link detailed defect maps to yield and lifetime specifications. As a result, SiC & GaN Wafer Defect Inspection remains a strategic, high-growth but technically demanding niche, where vendors compete less on raw throughput and more on physics-based sensitivity, subsurface visibility and actionable correlations to power-device performance and reliability.

This report is a detailed and comprehensive analysis for global SiC & GaN Wafer Defect Inspection System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Technology Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

**Key Features:**

Global SiC & GaN Wafer Defect Inspection System market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global SiC & GaN Wafer Defect Inspection System market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global SiC & GaN Wafer Defect Inspection System market size and forecasts, by Technology Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global SiC & GaN Wafer Defect Inspection System market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

**The Primary Objectives in This Report Are:**

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for SiC & GaN Wafer Defect Inspection System
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global SiC & GaN Wafer Defect Inspection System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include KLA Corporation, Lasertec, Visiontec Group, Nanotronics, TASMITE, Inc., Bruker, LAZIN CO.,LTD, HORIBA (EtaMax), Spirox Corporation, Angkun Vision (Beijing) Technology, etc.

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

**Market Segmentation**

SiC & GaN Wafer Defect Inspection System market is split by Technology Type and by Application. For the period 2021-2032, the growth among segments provides accurate

calculations and forecasts for consumption value by Technology Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Technology Type

Optical Inspection System (Photoluminescence)

X-ray Diffraction Imaging (XRDI) System

Optical Microscopy (OM) / DIC

Atomic Force Microscopy (AFM)

Others

#### Market segment by Type

Unpatterned Inspection

Patterned Inspection

Others

#### Market segment by End Market

Automotive Electronics

Consumer Electronics

Industrial

Communication

Others

## Market segment by Application

SiC Substrate, Epitaxy and Devices

GaN Substrate, Epitaxy and Devices

## Major players covered

KLA Corporation

Lasertec

Visiontec Group

Nanotronics

TASMIT, Inc.

Bruker

LAZIN CO.,LTD

HORIBA (EtaMax)

Spirox Corporation

Angkun Vision (Beijing) Technology

Shenzhen Glint Vision

CETC Fenghua Information Equipment

CASI Vision Technology (Luoyang) Co., Ltd

Shanghai Youruipu Semiconductor Equipment

Dalian Chuangrui Spectral Technology Co., Ltd

T-Vision.AI (Hangzhou) Tech Co.,Ltd.

HGTECH

Olympus (Evident)

Nikon

Leica Microsystems

Rigaku

Skyverse Technology

Attolight

Oxford Instruments

Park Systems

Hitachi High-Tech

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe SiC & GaN Wafer Defect Inspection System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of SiC & GaN Wafer Defect Inspection System, with price, sales quantity, revenue, and global market share of SiC & GaN Wafer Defect Inspection System from 2021 to 2026.

Chapter 3, the SiC & GaN Wafer Defect Inspection System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the SiC & GaN Wafer Defect Inspection System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Technology Type and by Application, with sales market share and growth rate by Technology Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and SiC & GaN Wafer Defect Inspection System market forecast, by regions, by Technology Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of SiC & GaN Wafer Defect Inspection System.

Chapter 14 and 15, to describe SiC & GaN Wafer Defect Inspection System sales channel, distributors, customers, research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Technology Type

1.3.1 Overview: Global SiC & GaN Wafer Defect Inspection System Consumption Value by Technology Type: 2021 Versus 2025 Versus 2032

1.3.2 Optical Inspection System (Photoluminescence)

1.3.3 X-ray Diffraction Imaging (XRDI) System

1.3.4 Optical Microscopy (OM) / DIC

1.3.5 Atomic Force Microscopy (AFM)

1.3.6 Others

1.4 Market Analysis by Type

1.4.1 Overview: Global SiC & GaN Wafer Defect Inspection System Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.4.2 Unpatterned Inspection

1.4.3 Patterned Inspection

1.4.4 Others

1.5 Market Analysis by End Market

1.5.1 Overview: Global SiC & GaN Wafer Defect Inspection System Consumption Value by End Market: 2021 Versus 2025 Versus 2032

1.5.2 Automotive Electronics

1.5.3 Consumer Electronics

1.5.4 Industrial

1.5.5 Communication

1.5.6 Others

1.6 Market Analysis by Application

1.6.1 Overview: Global SiC & GaN Wafer Defect Inspection System Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 SiC Substrate, Epitaxy and Devices

1.6.3 GaN Substrate, Epitaxy and Devices

1.7 Global SiC & GaN Wafer Defect Inspection System Market Size & Forecast

1.7.1 Global SiC & GaN Wafer Defect Inspection System Consumption Value (2021 & 2025 & 2032)

1.7.2 Global SiC & GaN Wafer Defect Inspection System Sales Quantity (2021-2032)

1.7.3 Global SiC & GaN Wafer Defect Inspection System Average Price (2021-2032)

## 2 MANUFACTURERS PROFILES

### 2.1 KLA Corporation

2.1.1 KLA Corporation Details

2.1.2 KLA Corporation Major Business

2.1.3 KLA Corporation SiC & GaN Wafer Defect Inspection System Product and Services

2.1.4 KLA Corporation SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 KLA Corporation Recent Developments/Updates

### 2.2 Lasertec

2.2.1 Lasertec Details

2.2.2 Lasertec Major Business

2.2.3 Lasertec SiC & GaN Wafer Defect Inspection System Product and Services

2.2.4 Lasertec SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Lasertec Recent Developments/Updates

### 2.3 Visiontec Group

2.3.1 Visiontec Group Details

2.3.2 Visiontec Group Major Business

2.3.3 Visiontec Group SiC & GaN Wafer Defect Inspection System Product and Services

2.3.4 Visiontec Group SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Visiontec Group Recent Developments/Updates

### 2.4 Nanotronics

2.4.1 Nanotronics Details

2.4.2 Nanotronics Major Business

2.4.3 Nanotronics SiC & GaN Wafer Defect Inspection System Product and Services

2.4.4 Nanotronics SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Nanotronics Recent Developments/Updates

### 2.5 TASMITECH, Inc.

2.5.1 TASMITECH, Inc. Details

2.5.2 TASMITECH, Inc. Major Business

2.5.3 TASMITECH, Inc. SiC & GaN Wafer Defect Inspection System Product and Services

2.5.4 TASMITECH, Inc. SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 TASMITECH, Inc. Recent Developments/Updates

## 2.6 Bruker

### 2.6.1 Bruker Details

### 2.6.2 Bruker Major Business

### 2.6.3 Bruker SiC & GaN Wafer Defect Inspection System Product and Services

### 2.6.4 Bruker SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.6.5 Bruker Recent Developments/Updates

## 2.7 LAZIN CO.,LTD

### 2.7.1 LAZIN CO.,LTD Details

### 2.7.2 LAZIN CO.,LTD Major Business

### 2.7.3 LAZIN CO.,LTD SiC & GaN Wafer Defect Inspection System Product and Services

### 2.7.4 LAZIN CO.,LTD SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.7.5 LAZIN CO.,LTD Recent Developments/Updates

## 2.8 HORIBA (EtaMax)

### 2.8.1 HORIBA (EtaMax) Details

### 2.8.2 HORIBA (EtaMax) Major Business

### 2.8.3 HORIBA (EtaMax) SiC & GaN Wafer Defect Inspection System Product and Services

### 2.8.4 HORIBA (EtaMax) SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.8.5 HORIBA (EtaMax) Recent Developments/Updates

## 2.9 Spirox Corporation

### 2.9.1 Spirox Corporation Details

### 2.9.2 Spirox Corporation Major Business

### 2.9.3 Spirox Corporation SiC & GaN Wafer Defect Inspection System Product and Services

### 2.9.4 Spirox Corporation SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.9.5 Spirox Corporation Recent Developments/Updates

## 2.10 Angkun Vision (Beijing) Technology

### 2.10.1 Angkun Vision (Beijing) Technology Details

### 2.10.2 Angkun Vision (Beijing) Technology Major Business

### 2.10.3 Angkun Vision (Beijing) Technology SiC & GaN Wafer Defect Inspection System Product and Services

### 2.10.4 Angkun Vision (Beijing) Technology SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.10.5 Angkun Vision (Beijing) Technology Recent Developments/Updates
- 2.11 Shenzhen Glint Vision
  - 2.11.1 Shenzhen Glint Vision Details
  - 2.11.2 Shenzhen Glint Vision Major Business
  - 2.11.3 Shenzhen Glint Vision SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.11.4 Shenzhen Glint Vision SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.11.5 Shenzhen Glint Vision Recent Developments/Updates
- 2.12 CETC Fenghua Information Equipment
  - 2.12.1 CETC Fenghua Information Equipment Details
  - 2.12.2 CETC Fenghua Information Equipment Major Business
  - 2.12.3 CETC Fenghua Information Equipment SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.12.4 CETC Fenghua Information Equipment SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.12.5 CETC Fenghua Information Equipment Recent Developments/Updates
- 2.13 CASI Vision Technology (Luoyang) Co., Ltd
  - 2.13.1 CASI Vision Technology (Luoyang) Co., Ltd Details
  - 2.13.2 CASI Vision Technology (Luoyang) Co., Ltd Major Business
  - 2.13.3 CASI Vision Technology (Luoyang) Co., Ltd SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.13.4 CASI Vision Technology (Luoyang) Co., Ltd SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.13.5 CASI Vision Technology (Luoyang) Co., Ltd Recent Developments/Updates
- 2.14 Shanghai Youruipu Semiconductor Equipment
  - 2.14.1 Shanghai Youruipu Semiconductor Equipment Details
  - 2.14.2 Shanghai Youruipu Semiconductor Equipment Major Business
  - 2.14.3 Shanghai Youruipu Semiconductor Equipment SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.14.4 Shanghai Youruipu Semiconductor Equipment SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.14.5 Shanghai Youruipu Semiconductor Equipment Recent Developments/Updates
- 2.15 Dalian Chuangrui Spectral Technology Co., Ltd
  - 2.15.1 Dalian Chuangrui Spectral Technology Co., Ltd Details
  - 2.15.2 Dalian Chuangrui Spectral Technology Co., Ltd Major Business

2.15.3 Dalian Chuangrui Spectral Technology Co., Ltd SiC & GaN Wafer Defect Inspection System Product and Services

2.15.4 Dalian Chuangrui Spectral Technology Co., Ltd SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Dalian Chuangrui Spectral Technology Co., Ltd Recent Developments/Updates  
2.16 T-Vision.AI (Hangzhou) Tech Co.,Ltd.

2.16.1 T-Vision.AI (Hangzhou) Tech Co.,Ltd. Details

2.16.2 T-Vision.AI (Hangzhou) Tech Co.,Ltd. Major Business

2.16.3 T-Vision.AI (Hangzhou) Tech Co.,Ltd. SiC & GaN Wafer Defect Inspection System Product and Services

2.16.4 T-Vision.AI (Hangzhou) Tech Co.,Ltd. SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 T-Vision.AI (Hangzhou) Tech Co.,Ltd. Recent Developments/Updates

2.17 HGTECH

2.17.1 HGTECH Details

2.17.2 HGTECH Major Business

2.17.3 HGTECH SiC & GaN Wafer Defect Inspection System Product and Services

2.17.4 HGTECH SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 HGTECH Recent Developments/Updates

2.18 Olympus (Evident)

2.18.1 Olympus (Evident) Details

2.18.2 Olympus (Evident) Major Business

2.18.3 Olympus (Evident) SiC & GaN Wafer Defect Inspection System Product and Services

2.18.4 Olympus (Evident) SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Olympus (Evident) Recent Developments/Updates

2.19 Nikon

2.19.1 Nikon Details

2.19.2 Nikon Major Business

2.19.3 Nikon SiC & GaN Wafer Defect Inspection System Product and Services

2.19.4 Nikon SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Nikon Recent Developments/Updates

2.20 Leica Microsystems

2.20.1 Leica Microsystems Details

- 2.20.2 Leica Microsystems Major Business
- 2.20.3 Leica Microsystems SiC & GaN Wafer Defect Inspection System Product and Services
- 2.20.4 Leica Microsystems SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.20.5 Leica Microsystems Recent Developments/Updates
- 2.21 Rigaku
  - 2.21.1 Rigaku Details
  - 2.21.2 Rigaku Major Business
  - 2.21.3 Rigaku SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.21.4 Rigaku SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.21.5 Rigaku Recent Developments/Updates
- 2.22 Skyverse Technology
  - 2.22.1 Skyverse Technology Details
  - 2.22.2 Skyverse Technology Major Business
  - 2.22.3 Skyverse Technology SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.22.4 Skyverse Technology SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.22.5 Skyverse Technology Recent Developments/Updates
- 2.23 Attolight
  - 2.23.1 Attolight Details
  - 2.23.2 Attolight Major Business
  - 2.23.3 Attolight SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.23.4 Attolight SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.23.5 Attolight Recent Developments/Updates
- 2.24 Oxford Instruments
  - 2.24.1 Oxford Instruments Details
  - 2.24.2 Oxford Instruments Major Business
  - 2.24.3 Oxford Instruments SiC & GaN Wafer Defect Inspection System Product and Services
  - 2.24.4 Oxford Instruments SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
  - 2.24.5 Oxford Instruments Recent Developments/Updates
- 2.25 Park Systems
  - 2.25.1 Park Systems Details
  - 2.25.2 Park Systems Major Business

2.25.3 Park Systems SiC & GaN Wafer Defect Inspection System Product and Services

2.25.4 Park Systems SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 Park Systems Recent Developments/Updates

2.26 Hitachi High-Tech

2.26.1 Hitachi High-Tech Details

2.26.2 Hitachi High-Tech Major Business

2.26.3 Hitachi High-Tech SiC & GaN Wafer Defect Inspection System Product and Services

2.26.4 Hitachi High-Tech SiC & GaN Wafer Defect Inspection System Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 Hitachi High-Tech Recent Developments/Updates

### **3 COMPETITIVE ENVIRONMENT: SiC & GaN Wafer Defect Inspection System by Manufacturer**

3.1 Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Manufacturer (2021-2026)

3.2 Global SiC & GaN Wafer Defect Inspection System Revenue by Manufacturer (2021-2026)

3.3 Global SiC & GaN Wafer Defect Inspection System Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of SiC & GaN Wafer Defect Inspection System by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 SiC & GaN Wafer Defect Inspection System Manufacturer Market Share in 2025

3.4.3 Top 6 SiC & GaN Wafer Defect Inspection System Manufacturer Market Share in 2025

3.5 SiC & GaN Wafer Defect Inspection System Market: Overall Company Footprint Analysis

3.5.1 SiC & GaN Wafer Defect Inspection System Market: Region Footprint

3.5.2 SiC & GaN Wafer Defect Inspection System Market: Company Product Type Footprint

3.5.3 SiC & GaN Wafer Defect Inspection System Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

## **4 CONSUMPTION ANALYSIS BY REGION**

### 4.1 Global SiC & GaN Wafer Defect Inspection System Market Size by Region

4.1.1 Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2021-2032)

4.1.2 Global SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2021-2032)

4.1.3 Global SiC & GaN Wafer Defect Inspection System Average Price by Region (2021-2032)

4.2 North America SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032)

4.3 Europe SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032)

4.4 Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032)

4.5 South America SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032)

4.6 Middle East & Africa SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032)

## **5 MARKET SEGMENT BY TECHNOLOGY TYPE**

5.1 Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

5.2 Global SiC & GaN Wafer Defect Inspection System Consumption Value by Technology Type (2021-2032)

5.3 Global SiC & GaN Wafer Defect Inspection System Average Price by Technology Type (2021-2032)

## **6 MARKET SEGMENT BY APPLICATION**

6.1 Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

6.2 Global SiC & GaN Wafer Defect Inspection System Consumption Value by Application (2021-2032)

6.3 Global SiC & GaN Wafer Defect Inspection System Average Price by Application (2021-2032)

## **7 NORTH AMERICA**

7.1 North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

7.2 North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

7.3 North America SiC & GaN Wafer Defect Inspection System Market Size by Country

7.3.1 North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2032)

7.3.2 North America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

## **8 EUROPE**

8.1 Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

8.2 Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

8.3 Europe SiC & GaN Wafer Defect Inspection System Market Size by Country

8.3.1 Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2032)

8.3.2 Europe SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

## **9 ASIA-PACIFIC**

9.1 Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

9.2 Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific SiC & GaN Wafer Defect Inspection System Market Size by Region

9.3.1 Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

## **10 SOUTH AMERICA**

10.1 South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

10.2 South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

10.3 South America SiC & GaN Wafer Defect Inspection System Market Size by Country

10.3.1 South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2032)

10.3.2 South America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

## **11 MIDDLE EAST & AFRICA**

11.1 Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2032)

11.2 Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa SiC & GaN Wafer Defect Inspection System Market Size by Country

11.3.1 Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

- 11.3.4 Egypt Market Size and Forecast (2021-2032)
- 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
- 11.3.6 South Africa Market Size and Forecast (2021-2032)

## **12 MARKET DYNAMICS**

- 12.1 SiC & GaN Wafer Defect Inspection System Market Drivers
- 12.2 SiC & GaN Wafer Defect Inspection System Market Restraints
- 12.3 SiC & GaN Wafer Defect Inspection System Trends Analysis
- 12.4 Porters Five Forces Analysis
  - 12.4.1 Threat of New Entrants
  - 12.4.2 Bargaining Power of Suppliers
  - 12.4.3 Bargaining Power of Buyers
  - 12.4.4 Threat of Substitutes
  - 12.4.5 Competitive Rivalry

## **13 RAW MATERIAL AND INDUSTRY CHAIN**

- 13.1 Raw Material of SiC & GaN Wafer Defect Inspection System and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of SiC & GaN Wafer Defect Inspection System
- 13.3 SiC & GaN Wafer Defect Inspection System Production Process
- 13.4 Industry Value Chain Analysis

## **14 SHIPMENTS BY DISTRIBUTION CHANNEL**

- 14.1 Sales Channel
  - 14.1.1 Direct to End-User
  - 14.1.2 Distributors
- 14.2 SiC & GaN Wafer Defect Inspection System Typical Distributors
- 14.3 SiC & GaN Wafer Defect Inspection System Typical Customers

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 APPENDIX**

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer



## List Of Figures

### LIST OF FIGURES

Table 1. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Technology Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 3. Global SiC & GaN Wafer Defect Inspection System Consumption Value by End Market, (USD Million), 2021 & 2025 & 2032

Table 4. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. KLA Corporation Basic Information, Manufacturing Base and Competitors

Table 6. KLA Corporation Major Business

Table 7. KLA Corporation SiC & GaN Wafer Defect Inspection System Product and Services

Table 8. KLA Corporation SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. KLA Corporation Recent Developments/Updates

Table 10. Lasertec Basic Information, Manufacturing Base and Competitors

Table 11. Lasertec Major Business

Table 12. Lasertec SiC & GaN Wafer Defect Inspection System Product and Services

Table 13. Lasertec SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Lasertec Recent Developments/Updates

Table 15. Visiontec Group Basic Information, Manufacturing Base and Competitors

Table 16. Visiontec Group Major Business

Table 17. Visiontec Group SiC & GaN Wafer Defect Inspection System Product and Services

Table 18. Visiontec Group SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Visiontec Group Recent Developments/Updates

Table 20. Nanotronics Basic Information, Manufacturing Base and Competitors

Table 21. Nanotronics Major Business

Table 22. Nanotronics SiC & GaN Wafer Defect Inspection System Product and Services

Table 23. Nanotronics SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Nanotronics Recent Developments/Updates

Table 25. TASMITECH, Inc. Basic Information, Manufacturing Base and Competitors

Table 26. TASMITECH, Inc. Major Business

Table 27. TASMITECH, Inc. SiC & GaN Wafer Defect Inspection System Product and Services

Table 28. TASMITECH, Inc. SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. TASMITECH, Inc. Recent Developments/Updates

Table 30. Bruker Basic Information, Manufacturing Base and Competitors

Table 31. Bruker Major Business

Table 32. Bruker SiC & GaN Wafer Defect Inspection System Product and Services

Table 33. Bruker SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Bruker Recent Developments/Updates

Table 35. LAZIN CO.,LTD Basic Information, Manufacturing Base and Competitors

Table 36. LAZIN CO.,LTD Major Business

Table 37. LAZIN CO.,LTD SiC & GaN Wafer Defect Inspection System Product and Services

Table 38. LAZIN CO.,LTD SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. LAZIN CO.,LTD Recent Developments/Updates

Table 40. HORIBA (EtaMax) Basic Information, Manufacturing Base and Competitors

Table 41. HORIBA (EtaMax) Major Business

Table 42. HORIBA (EtaMax) SiC & GaN Wafer Defect Inspection System Product and Services

Table 43. HORIBA (EtaMax) SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. HORIBA (EtaMax) Recent Developments/Updates

Table 45. Spiro Corporation Basic Information, Manufacturing Base and Competitors

Table 46. Spiro Corporation Major Business

Table 47. Spiro Corporation SiC & GaN Wafer Defect Inspection System Product and Services

Table 48. Spirox Corporation SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Spirox Corporation Recent Developments/Updates

Table 50. Angkun Vision (Beijing) Technology Basic Information, Manufacturing Base and Competitors

Table 51. Angkun Vision (Beijing) Technology Major Business

Table 52. Angkun Vision (Beijing) Technology SiC & GaN Wafer Defect Inspection System Product and Services

Table 53. Angkun Vision (Beijing) Technology SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Angkun Vision (Beijing) Technology Recent Developments/Updates

Table 55. Shenzhen Glint Vision Basic Information, Manufacturing Base and Competitors

Table 56. Shenzhen Glint Vision Major Business

Table 57. Shenzhen Glint Vision SiC & GaN Wafer Defect Inspection System Product and Services

Table 58. Shenzhen Glint Vision SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Shenzhen Glint Vision Recent Developments/Updates

Table 60. CETC Fenghua Information Equipment Basic Information, Manufacturing Base and Competitors

Table 61. CETC Fenghua Information Equipment Major Business

Table 62. CETC Fenghua Information Equipment SiC & GaN Wafer Defect Inspection System Product and Services

Table 63. CETC Fenghua Information Equipment SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. CETC Fenghua Information Equipment Recent Developments/Updates

Table 65. CASI Vision Technology (Luoyang) Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 66. CASI Vision Technology (Luoyang) Co., Ltd Major Business

Table 67. CASI Vision Technology (Luoyang) Co., Ltd SiC & GaN Wafer Defect Inspection System Product and Services

Table 68. CASI Vision Technology (Luoyang) Co., Ltd SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. CASI Vision Technology (Luoyang) Co., Ltd Recent Developments/Updates

Table 70. Shanghai Youruipu Semiconductor Equipment Basic Information, Manufacturing Base and Competitors

Table 71. Shanghai Youruipu Semiconductor Equipment Major Business

Table 72. Shanghai Youruipu Semiconductor Equipment SiC & GaN Wafer Defect Inspection System Product and Services

Table 73. Shanghai Youruipu Semiconductor Equipment SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Shanghai Youruipu Semiconductor Equipment Recent Developments/Updates

Table 75. Dalian Chuangrui Spectral Technology Co., Ltd Basic Information, Manufacturing Base and Competitors

Table 76. Dalian Chuangrui Spectral Technology Co., Ltd Major Business

Table 77. Dalian Chuangrui Spectral Technology Co., Ltd SiC & GaN Wafer Defect Inspection System Product and Services

Table 78. Dalian Chuangrui Spectral Technology Co., Ltd SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Dalian Chuangrui Spectral Technology Co., Ltd Recent Developments/Updates

Table 80. T-Vision.AI (Hangzhou) Tech Co.,Ltd. Basic Information, Manufacturing Base and Competitors

Table 81. T-Vision.AI (Hangzhou) Tech Co.,Ltd. Major Business

Table 82. T-Vision.AI (Hangzhou) Tech Co.,Ltd. SiC & GaN Wafer Defect Inspection System Product and Services

Table 83. T-Vision.AI (Hangzhou) Tech Co.,Ltd. SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. T-Vision.AI (Hangzhou) Tech Co.,Ltd. Recent Developments/Updates

Table 85. HGTECH Basic Information, Manufacturing Base and Competitors

Table 86. HGTECH Major Business

Table 87. HGTECH SiC & GaN Wafer Defect Inspection System Product and Services

Table 88. HGTECH SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. HGTECH Recent Developments/Updates

Table 90. Olympus (Evident) Basic Information, Manufacturing Base and Competitors

Table 91. Olympus (Evident) Major Business

Table 92. Olympus (Evident) SiC & GaN Wafer Defect Inspection System Product and Services

Table 93. Olympus (Evident) SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Olympus (Evident) Recent Developments/Updates

Table 95. Nikon Basic Information, Manufacturing Base and Competitors

Table 96. Nikon Major Business

Table 97. Nikon SiC & GaN Wafer Defect Inspection System Product and Services

Table 98. Nikon SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. Nikon Recent Developments/Updates

Table 100. Leica Microsystems Basic Information, Manufacturing Base and Competitors

Table 101. Leica Microsystems Major Business

Table 102. Leica Microsystems SiC & GaN Wafer Defect Inspection System Product and Services

Table 103. Leica Microsystems SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Leica Microsystems Recent Developments/Updates

Table 105. Rigaku Basic Information, Manufacturing Base and Competitors

Table 106. Rigaku Major Business

Table 107. Rigaku SiC & GaN Wafer Defect Inspection System Product and Services

Table 108. Rigaku SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Rigaku Recent Developments/Updates

Table 110. Skyverse Technology Basic Information, Manufacturing Base and Competitors

Table 111. Skyverse Technology Major Business

Table 112. Skyverse Technology SiC & GaN Wafer Defect Inspection System Product and Services

Table 113. Skyverse Technology SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Skyverse Technology Recent Developments/Updates

Table 115. Attolight Basic Information, Manufacturing Base and Competitors

Table 116. Attolight Major Business

- Table 117. Attolight SiC & GaN Wafer Defect Inspection System Product and Services
- Table 118. Attolight SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 119. Attolight Recent Developments/Updates
- Table 120. Oxford Instruments Basic Information, Manufacturing Base and Competitors
- Table 121. Oxford Instruments Major Business
- Table 122. Oxford Instruments SiC & GaN Wafer Defect Inspection System Product and Services
- Table 123. Oxford Instruments SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 124. Oxford Instruments Recent Developments/Updates
- Table 125. Park Systems Basic Information, Manufacturing Base and Competitors
- Table 126. Park Systems Major Business
- Table 127. Park Systems SiC & GaN Wafer Defect Inspection System Product and Services
- Table 128. Park Systems SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 129. Park Systems Recent Developments/Updates
- Table 130. Hitachi High-Tech Basic Information, Manufacturing Base and Competitors
- Table 131. Hitachi High-Tech Major Business
- Table 132. Hitachi High-Tech SiC & GaN Wafer Defect Inspection System Product and Services
- Table 133. Hitachi High-Tech SiC & GaN Wafer Defect Inspection System Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 134. Hitachi High-Tech Recent Developments/Updates
- Table 135. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Manufacturer (2021-2026) & (Units)
- Table 136. Global SiC & GaN Wafer Defect Inspection System Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 137. Global SiC & GaN Wafer Defect Inspection System Average Price by Manufacturer (2021-2026) & (K US\$/Unit)
- Table 138. Market Position of Manufacturers in SiC & GaN Wafer Defect Inspection System, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 139. Head Office and SiC & GaN Wafer Defect Inspection System Production Site of Key Manufacturer

Table 140. SiC & GaN Wafer Defect Inspection System Market: Company Product Type Footprint

Table 141. SiC & GaN Wafer Defect Inspection System Market: Company Product Application Footprint

Table 142. SiC & GaN Wafer Defect Inspection System New Market Entrants and Barriers to Market Entry

Table 143. SiC & GaN Wafer Defect Inspection System Mergers, Acquisition, Agreements, and Collaborations

Table 144. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 145. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2021-2026) & (Units)

Table 146. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2027-2032) & (Units)

Table 147. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2021-2026) & (USD Million)

Table 148. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2027-2032) & (USD Million)

Table 149. Global SiC & GaN Wafer Defect Inspection System Average Price by Region (2021-2026) & (K US\$/Unit)

Table 150. Global SiC & GaN Wafer Defect Inspection System Average Price by Region (2027-2032) & (K US\$/Unit)

Table 151. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 152. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 153. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Technology Type (2021-2026) & (USD Million)

Table 154. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Technology Type (2027-2032) & (USD Million)

Table 155. Global SiC & GaN Wafer Defect Inspection System Average Price by Technology Type (2021-2026) & (K US\$/Unit)

Table 156. Global SiC & GaN Wafer Defect Inspection System Average Price by Technology Type (2027-2032) & (K US\$/Unit)

Table 157. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 158. Global SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2027-2032) & (Units)

Table 159. Global SiC & GaN Wafer Defect Inspection System Consumption Value by

Application (2021-2026) & (USD Million)

Table 160. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Application (2027-2032) & (USD Million)

Table 161. Global SiC & GaN Wafer Defect Inspection System Average Price by Application (2021-2026) & (K US\$/Unit)

Table 162. Global SiC & GaN Wafer Defect Inspection System Average Price by Application (2027-2032) & (K US\$/Unit)

Table 163. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 164. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 165. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 166. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2027-2032) & (Units)

Table 167. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2026) & (Units)

Table 168. North America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2027-2032) & (Units)

Table 169. North America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2026) & (USD Million)

Table 170. North America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2027-2032) & (USD Million)

Table 171. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 172. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 173. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 174. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2027-2032) & (Units)

Table 175. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2026) & (Units)

Table 176. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2027-2032) & (Units)

Table 177. Europe SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2026) & (USD Million)

Table 178. Europe SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2027-2032) & (USD Million)

Table 179. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 180. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 181. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 182. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2027-2032) & (Units)

Table 183. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2021-2026) & (Units)

Table 184. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity by Region (2027-2032) & (Units)

Table 185. Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2021-2026) & (USD Million)

Table 186. Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value by Region (2027-2032) & (USD Million)

Table 187. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 188. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 189. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 190. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2027-2032) & (Units)

Table 191. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2021-2026) & (Units)

Table 192. South America SiC & GaN Wafer Defect Inspection System Sales Quantity by Country (2027-2032) & (Units)

Table 193. South America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2021-2026) & (USD Million)

Table 194. South America SiC & GaN Wafer Defect Inspection System Consumption Value by Country (2027-2032) & (USD Million)

Table 195. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2021-2026) & (Units)

Table 196. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Technology Type (2027-2032) & (Units)

Table 197. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity by Application (2021-2026) & (Units)

Table 198. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales

Quantity by Application (2027-2032) & (Units)

Table 199. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales

Quantity by Country (2021-2026) & (Units)

Table 200. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales

Quantity by Country (2027-2032) & (Units)

Table 201. Middle East & Africa SiC & GaN Wafer Defect Inspection System

Consumption Value by Country (2021-2026) & (USD Million)

Table 202. Middle East & Africa SiC & GaN Wafer Defect Inspection System

Consumption Value by Country (2027-2032) & (USD Million)

Table 203. SiC & GaN Wafer Defect Inspection System Raw Material

Table 204. Key Manufacturers of SiC & GaN Wafer Defect Inspection System Raw Materials

Table 205. SiC & GaN Wafer Defect Inspection System Typical Distributors

Table 206. SiC & GaN Wafer Defect Inspection System Typical Customers

## **LIST OF FIGURES**

Figure 1. SiC & GaN Wafer Defect Inspection System Picture

Figure 2. Global SiC & GaN Wafer Defect Inspection System Revenue by Technology Type, (USD Million), 2021 & 2025 & 2032

Figure 3. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by Technology Type in 2025

Figure 4. Optical Inspection System (Photoluminescence) Examples

Figure 5. X-ray Diffraction Imaging (XRDI) System Examples

Figure 6. Optical Microscopy (OM) / DIC Examples

Figure 7. Atomic Force Microscopy (AFM) Examples

Figure 8. Others Examples

Figure 9. Global SiC & GaN Wafer Defect Inspection System Revenue by Type, (USD Million), 2021 & 2025 & 2032

Figure 10. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by Type in 2025

Figure 11. Unpatterned Inspection Examples

Figure 12. Patterned Inspection Examples

Figure 13. Others Examples

Figure 14. Global SiC & GaN Wafer Defect Inspection System Revenue by End Market, (USD Million), 2021 & 2025 & 2032

Figure 15. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by End Market in 2025

Figure 16. Automotive Electronics Examples

Figure 17. Consumer Electronics Examples

Figure 18. Industrial Examples

Figure 19. Communication Examples

Figure 20. Others Examples

Figure 21. Global SiC & GaN Wafer Defect Inspection System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 22. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by Application in 2025

Figure 23. SiC Substrate, Epitaxy and Devices Examples

Figure 24. GaN Substrate, Epitaxy and Devices Examples

Figure 25. Global SiC & GaN Wafer Defect Inspection System Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 26. Global SiC & GaN Wafer Defect Inspection System Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 27. Global SiC & GaN Wafer Defect Inspection System Sales Quantity (2021-2032) & (Units)

Figure 28. Global SiC & GaN Wafer Defect Inspection System Price (2021-2032) & (K US\$/Unit)

Figure 29. Global SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Manufacturer in 2025

Figure 30. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by Manufacturer in 2025

Figure 31. Producer Shipments of SiC & GaN Wafer Defect Inspection System by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 32. Top 3 SiC & GaN Wafer Defect Inspection System Manufacturer (Revenue) Market Share in 2025

Figure 33. Top 6 SiC & GaN Wafer Defect Inspection System Manufacturer (Revenue) Market Share in 2025

Figure 34. Global SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Region (2021-2032)

Figure 35. Global SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Region (2021-2032)

Figure 36. North America SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 37. Europe SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 38. Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 39. South America SiC & GaN Wafer Defect Inspection System Consumption

Value (2021-2032) & (USD Million)

Figure 40. Middle East & Africa SiC & GaN Wafer Defect Inspection System

Consumption Value (2021-2032) & (USD Million)

Figure 41. Global SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 42. Global SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Technology Type (2021-2032)

Figure 43. Global SiC & GaN Wafer Defect Inspection System Average Price by Technology Type (2021-2032) & (K US\$/Unit)

Figure 44. Global SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 45. Global SiC & GaN Wafer Defect Inspection System Revenue Market Share by Application (2021-2032)

Figure 46. Global SiC & GaN Wafer Defect Inspection System Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 47. North America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 48. North America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 49. North America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Country (2021-2032)

Figure 50. North America SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Country (2021-2032)

Figure 51. United States SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 52. Canada SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 53. Mexico SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 54. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 55. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 56. Europe SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Country (2021-2032)

Figure 57. Europe SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Country (2021-2032)

Figure 58. Germany SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 59. France SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 60. United Kingdom SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 61. Russia SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 62. Italy SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 63. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 64. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 65. Asia-Pacific SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Region (2021-2032)

Figure 66. Asia-Pacific SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Region (2021-2032)

Figure 67. China SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 68. Japan SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 69. South Korea SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 70. India SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 71. Southeast Asia SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 72. Australia SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 73. South America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 74. South America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 75. South America SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Country (2021-2032)

Figure 76. South America SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Country (2021-2032)

Figure 77. Brazil SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 78. Argentina SiC & GaN Wafer Defect Inspection System Consumption Value

(2021-2032) & (USD Million)

Figure 79. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Technology Type (2021-2032)

Figure 80. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Application (2021-2032)

Figure 81. Middle East & Africa SiC & GaN Wafer Defect Inspection System Sales Quantity Market Share by Country (2021-2032)

Figure 82. Middle East & Africa SiC & GaN Wafer Defect Inspection System Consumption Value Market Share by Country (2021-2032)

Figure 83. Turkey SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 84. Egypt SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 85. Saudi Arabia SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 86. South Africa SiC & GaN Wafer Defect Inspection System Consumption Value (2021-2032) & (USD Million)

Figure 87. SiC & GaN Wafer Defect Inspection System Market Drivers

Figure 88. SiC & GaN Wafer Defect Inspection System Market Restraints

Figure 89. SiC & GaN Wafer Defect Inspection System Market Trends

Figure 90. Porters Five Forces Analysis

Figure 91. Manufacturing Cost Structure Analysis of SiC & GaN Wafer Defect Inspection System in 2025

Figure 92. Manufacturing Process Analysis of SiC & GaN Wafer Defect Inspection System

Figure 93. SiC & GaN Wafer Defect Inspection System Industrial Chain

Figure 94. Sales Channel: Direct to End-User vs Distributors

Figure 95. Direct Channel Pros & Cons

Figure 96. Indirect Channel Pros & Cons

Figure 97. Methodology

Figure 98. Research Process and Data Source

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