

# Global Wafer Film Thickness Metrology Tool 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 Wafer Film Thickness Metrology Tool market size was valued at US\$ 833 million in 2025 and is forecast to a readjusted size of US\$ 1119 million by 2032 with a CAGR of 4.3% during review period.

A wafer film thickness metrology tool is a process-control system used in semiconductor wafer manufacturing to measure the thickness and within-wafer uniformity of single-layer or multilayer films, together with related optical or material parameters, through non-contact and non-destructive methods. These systems generally employ spectroscopic reflectometry, spectroscopic ellipsometry, optical interferometry, picosecond ultrasonics, or multisensor architectures. They collect reflected intensity, polarization changes, interference spectra, or acoustic responses and combine the resulting data with film-stack models, material optical-constant libraries, and fitting algorithms to determine film thickness distributions from the nanometer to millimeter range, as well as refractive index, extinction coefficient, acoustic velocity, elastic modulus, roughness, or composition. Available configurations include single-point benchtop instruments, automated two-dimensional mapping systems, fully automated cassette-to-cassette platforms, and integrated in-line metrology systems. They can support unpatterned monitor wafers, patterned product wafers, bonded wafers, warped wafers, and framed wafers. Typical uses include recipe development, tool matching, endpoint determination, uniformity assessment, statistical process control, and yield management for deposition, oxidation, photoresist coating, etching, chemical mechanical planarization, metallization, wafer thinning, and advanced packaging. Customers include logic and memory fabs, power and RF device manufacturers, advanced packaging facilities, wafer-material suppliers, research institutions, and semiconductor process-equipment manufacturers. Deliverables generally include the

main system, automated handling modules, measurement heads, modeling and recipe software, reference wafers, data interfaces, application development, calibration services, maintenance, and long-term service agreements.

Wafer film thickness metrology is evolving from the delivery of a single thickness reading toward multiparameter process control for increasingly complex film stacks. Advanced logic and memory devices continue to introduce high-k materials, low-k materials, metal gates, hard masks, deep trenches, and multilayer structures, expanding the measurement target from transparent dielectrics to absorbing semiconductors, metals, and heterogeneous material combinations. Conventional single-wavelength or single-point measurements are therefore becoming less capable of simultaneously meeting requirements for range, speed, and model uniqueness. Spectroscopic reflectometry remains a fundamental solution with favorable cost and throughput, while spectroscopic ellipsometry can determine thickness and optical constants concurrently. Picosecond ultrasonics is suitable for opaque metallic films, optical interferometry and area imaging are effective for thicker films and rapid full-wafer distribution measurement, and multisensor platforms reduce parameter correlation through complementary signals. The value of a metrology system is no longer determined solely by nominal precision. Small measurement spots, pattern recognition, autofocus, model stability, tool-to-tool matching, long-term repeatability, edge-exclusion performance, warped-wafer compatibility, and real-time connectivity with factory automation and advanced process-control systems have become equally important. As process windows narrow, film-thickness data will play a deeper role in equipment adjustment, drift detection, virtual metrology, and closed-loop control, making software, model libraries, and application engineering major components of production value.

Demand growth is being driven by the simultaneous expansion of advanced process nodes, three-dimensional memory, power and RF devices, and advanced packaging. The transition of logic devices toward gate-all-around structures, backside power delivery, and more complex interconnects requires frequent monitoring of ultrathin dielectric layers, metal films, and stress-related layers. Continued increases in three-dimensional memory layer counts require metrology systems to address stacks containing tens or hundreds of layers, ultrathick hard masks, and optical-modeling challenges created by high-aspect-ratio structures. Silicon carbide, gallium nitride, RF filters, and MEMS devices are also expanding demand for measurements across different substrates, anisotropic materials, and thicker functional films. In advanced packaging, redistribution layers, photoresists, copper pillars, microbumps, through-silicon vias, bonding, and wafer thinning are accelerating the adoption of multisensor platforms, framed-wafer handling, and warpage compensation. Procurement decisions

will increasingly consider measurement time per wafer, effective sampling density, automation level, recipe-transfer efficiency, tool matching, data integrity, and total cost of ownership rather than instrument precision alone. Benchtop research tools will remain important for material development and process validation, but higher-value growth will increasingly concentrate in automated and integrated platforms capable of cleanroom operation, standard communications, sustained production stability, and integration with yield-management systems. This development will further improve production yield and process stability.

The global supply structure combines concentration in high-end front-end platforms, fragmentation among specialized thin-film instrument suppliers, and accelerating localization. Suppliers in the United States, Israel, and Europe have accumulated strong capabilities in integrated optical metrology for advanced logic and memory, acoustic measurement of metal films, complex modeling software, and global service networks. Japanese suppliers maintain a stable foundation in spectroscopic ellipsometry, spectral interferometry, precision optics, and automated wafer handling. Chinese suppliers are expanding production validation and commercial deployment in dielectric-film metrology, metal-film metrology, optical critical-dimension measurement, and localized fab support. Competition will not be limited to hardware specifications. Leading suppliers will increase customer switching costs through sensor combinations, algorithms, reference-wafer systems, application databases, factory interfaces, and service responsiveness, while specialized suppliers can enter research, specialty-process, and mature-node markets with compact systems, small measurement spots, broad measurement ranges, customization, and lower cost. Production will remain concentrated in regions with strong precision optomechanical, spectroscopy, automation-control, and semiconductor application-engineering capabilities, while sales will closely follow investments in wafer fabrication, memory capacity, power semiconductors, and advanced packaging. Future opportunities will increasingly arise from multimodal sensing, high-speed full-wafer imaging, automated modeling of complex stacks, artificial-intelligence-assisted recipes, localized supply chains, and regional service systems, supporting continued long-term market expansion and technological upgrading.

## Report Scope

This report is a detailed and comprehensive analysis for global Wafer Film Thickness Metrology Tool market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Primary Measurement Principle 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 Wafer Film Thickness Metrology Tool market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Film Thickness Metrology Tool market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Film Thickness Metrology Tool market size and forecasts, by Primary Measurement Principle and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Film Thickness Metrology Tool market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 Wafer Film Thickness Metrology Tool

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 Wafer Film Thickness Metrology Tool 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, Onto Innovation Inc., Nova Ltd., SCREEN Holdings Co., Ltd., HORIBA, Ltd., Hamamatsu Photonics K.K., Otsuka Holdings Co., Ltd., Lasertec Corporation, J.A. Woollam Co., Inc., Semilab Zrt., etc.

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

## Market Segmentation

Wafer Film Thickness Metrology Tool market is split by Primary Measurement Principle and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Primary Measurement Principle, 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 Primary Measurement Principle

Spectroscopic Reflectometry Dominant

Spectroscopic Ellipsometry Dominant

Spectroscopic Interferometry Dominant

Picosecond Ultrasonics Dominant

Other

### Market segment by Automation and Deployment Topology

Manual Benchtop

Semi-Automated Mapping Workstation

Fully Automated Stand-Alone

Integrated or In-Line

Other

### Market segment by Spatial Sampling and Spot Size

Macro-Spot Single-Point

Micro-Spot Single-Point

Ultra-Micro-Spot Single-Point

Point-Scanning Mapping

Area-Array Full-Field

Continuous In-Line Monitoring

Other

#### Market segment by Measurement Output Package

Thickness-Only Output

Thickness and Optical Parameters

Thickness and Mechanical Parameters

Thickness and Geometrical Topography

Thickness and Composition or Structure

Other

#### Market segment by Application

Logic and Foundry Manufacturing

Memory Manufacturing

Advanced Packaging and Heterogeneous Integration

Power and Compound Semiconductor Manufacturing

MEMS and Sensor Manufacturing

Other

#### Major players covered

KLA Corporation

Onto Innovation Inc.

Nova Ltd.

SCREEN Holdings Co., Ltd.

HORIBA, Ltd.

Hamamatsu Photonics K.K.

Otsuka Holdings Co., Ltd.

Lasertec Corporation

J.A. Woollam Co., Inc.

Semilab Zrt.

SENTECH Instruments GmbH

Film Sense, LLC

Gaertner Scientific Corporation

Semiconsoft, Inc.

Bruker Corporation

Angstrom Sun Technologies Inc.

Advanced Spectral Technology, Inc.

Camtek Ltd.

Merck KGaA

k-Space Associates, Inc.

Wuhan Jingce Electronic Group Co., Ltd.

Shenzhen Skyverse Technology Co., Ltd.

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)

## Chapter Outline

Chapter 1, to describe Wafer Film Thickness Metrology Tool product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Wafer Film Thickness Metrology Tool, with price, sales quantity, revenue, and global market share of Wafer Film Thickness Metrology Tool from 2021 to 2026.

Chapter 3, the Wafer Film Thickness Metrology Tool competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed



emphatically by landscape contrast.

Chapter 4, the Wafer Film Thickness Metrology Tool 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 Primary Measurement Principle and by Application, with sales market share and growth rate by Primary Measurement Principle, 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 Wafer Film Thickness Metrology Tool market forecast, by regions, by Primary Measurement Principle, 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 Wafer Film Thickness Metrology Tool.

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