

Global Wafer Inspection and Metrology System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Wafer Inspection and Metrology System market size is expected to reach \$ 2352 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

A Wafer Inspection and Metrology System is a specialized, high-precision tool used in semiconductor manufacturing to measure physical dimensions and detect microscopic defects on silicon wafers. It acts as the 'quality control' hub, ensuring that nanometer-scale chips are built correctly at every step of fabrication.

In 2025, global Wafer Inspection and Metrology System sales volume reached 534 units, with average price of 2560 k US\$ per unit.

Advanced nodes are increasing the need for tighter process control. As logic, foundry, DRAM, and 3D NAND processes move toward smaller critical dimensions and more complex structures, wafer inspection and metrology systems are becoming more important for yield control. Defect tolerance is shrinking, overlay requirements are stricter, and process windows are narrower, so fabs need more frequent inspection and more accurate metrology at each major process step. ASML describes optical and e-beam metrology/inspection tools as systems used to measure pattern quality before and during high-volume chip manufacturing, showing that inspection and metrology are now embedded directly into advanced production control rather than being only final quality-check tools.

AI, HPC, and advanced memory are driving equipment demand. Demand for AI accelerators, high-performance computing chips, and HBM is pushing foundries and memory makers to expand advanced capacity. SEMI projected continued growth in

wafer fab equipment spending as chipmakers add capacity for AI accelerators, HPC, premium mobile processors, DRAM, and HBM, which directly benefits inspection and metrology suppliers because every new advanced fab requires process-control tools.

Advanced packaging is becoming one of the fastest-growing application areas. Wafer inspection and metrology demand is expanding from front-end wafer fabrication into advanced packaging, including fan-out, 2.5D/3D packaging, chiplets, TSV, hybrid bonding, micro-bumps, and HBM integration. Onto Innovation reported a large volume purchase agreement with an HBM manufacturer for 2D inspection and 3D bump metrology, which reflects how packaging yield control is becoming critical as AI chips rely more heavily on high-density interconnects and multi-die integration.

E-beam inspection is gaining importance for nano-scale and hard-to-detect defects. Optical inspection remains the high-throughput mainstream solution, but e-beam inspection is increasingly used for advanced nodes where defects are too small or too complex for traditional optical methods. ASML states that its HMI e-beam solutions help locate and analyze individual chip defects among millions of printed patterns, and its eScan 1000 uses multibeam technology to improve inspection speed compared with previous e-beam tools.

Metrology is shifting from 2D measurement to 3D structural control. The market is moving beyond simple linewidth, overlay, and film-thickness measurement toward 3D profile, topography, bump height, wafer warpage, TSV/TGV, and high-aspect-ratio structure measurement. This is especially important for 3D NAND, FinFET/GAA logic, MEMS, compound semiconductors, and advanced packaging. The technical direction is toward non-destructive, high-resolution, multi-parameter metrology that can measure both surface and buried structures without slowing production too much.

This report studies the global Wafer Inspection and Metrology System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wafer Inspection and Metrology 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 Wafer Inspection and Metrology System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Wafer Inspection and Metrology System total production and demand, 2021-2032, (Units)

Global Wafer Inspection and Metrology System total production value, 2021-2032, (USD Million)

Global Wafer Inspection and Metrology System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Wafer Inspection and Metrology System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Wafer Inspection and Metrology System domestic production, consumption, key domestic manufacturers and share

Global Wafer Inspection and Metrology System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Wafer Inspection and Metrology System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Wafer Inspection and Metrology System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Wafer Inspection and Metrology 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 KLA, Applied Materials, ASML, Hitachi High-Tech, Lasertec, Onto Innovation, Nova, Camtek, Nikon, JEOL, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Wafer Inspection and Metrology System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Wafer Inspection and Metrology System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Wafer Inspection and Metrology System Market, Segmentation by Type:

Inspection System

Metrology System

Global Wafer Inspection and Metrology System Market, Segmentation by Inspection System:

Optical Wafer Inspection System

E-beam Wafer Inspection System

Macro Defect Inspection System

Other

Global Wafer Inspection and Metrology System Market, Segmentation by Metrology

System:

Patterned Wafer Inspection System

Overlay Metrology System

Other

Global Wafer Inspection and Metrology System Market, Segmentation by Application:

IDM

Foundry

Companies Profiled:

KLA

Applied Materials

ASML

Hitachi High-Tech

Lasertec

Onto Innovation

Nova

Camtek

Nikon

JEOL

SCREEN SPE

UnitySC

Bruker

PMISH

Skyverse

Key Questions Answered:

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

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