

# Global Wafer Inspection and Sorting Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Wafer Inspection and Sorting Equipment market size is expected to reach \$ 8481 million by 2032, rising at a market growth of 9.3% CAGR during the forecast period (2026-2032).

In 2025, global sales of wafer inspection and sorting equipment reached 5,200 units, with an average selling price of US\$850,000. Wafer inspection and sorting equipment is a core piece of equipment used in semiconductor manufacturing processes to automatically detect surface defects, electrical properties, and yield of wafers and sort them according to quality levels. It covers appearance inspection, defect re-judgment, electrical testing, and automatic wafer loading and unloading systems, which can significantly improve process yield and production line efficiency. Its upstream raw materials and core components include high-resolution industrial cameras and CMOS sensors, precision optical lenses and light sources, motion control platforms, vacuum robots, control systems, and structural components. On average, a single unit of equipment consumes 4-6 sets of cameras and 3 sets of optical lenses. The equipment includes 8 precision motors, approximately 800 kg of steel and aluminum structural components, and approximately 60 kg of electronic components. Downstream suppliers primarily include wafer foundries, IDMs, foundries, and packaging and testing companies. 12-inch wafer production lines account for 60%, 8-inch wafers for 25%, and power and compound semiconductor production lines for 15%. Global total capacity is approximately 6,000 units per year, with an industry gross margin of approximately 45%-55%. Future growth lies in upgrading to higher resolution optics and multimodal detection, AI defect recognition, full automation, and compatibility with large-size wafers. Demand and business opportunities stem from the expansion of advanced processes, the mass production of automotive-grade and power semiconductors, and the accelerated pace of domestic substitution, driving the continued penetration of mid-to-high-end wafer inspection and sorting equipment.

From a market perspective, wafer inspection and sorting equipment is currently in a growth cycle characterized by 'high prosperity + strong technology-driven growth.' As advanced processes evolve towards 3nm and below, and mature processes continue to expand production in the automotive, industrial, and power device sectors, the impact of wafer defect control on yield and cost is amplified significantly. This has upgraded inspection and sorting equipment from 'auxiliary equipment' to 'critical yield equipment,' resulting in long-term rigid demand and high growth elasticity in the industry.

From a structural trend perspective, the market is upgrading from traditional optical inspection to a 'multimodal + AI' approach. High-resolution optics, combined bright and dark field analysis, electron beam re-judgment, and the synergy of AI algorithms are becoming the mainstream approach. The advanced nodes' demand for identifying submicron and even nanometer-level defects significantly raises the technological threshold and drives a continuous increase in the value of individual equipment, enabling leading manufacturers to establish strong competitive advantages in the high-end market.

From a competitive landscape perspective, international leaders still dominate advanced processes and high-end applications, maintaining high market share through long-term process accumulation and customer certification systems. Meanwhile, in mature processes, power semiconductors, and specialty processes, domestic manufacturers are accelerating their penetration by offering cost-effectiveness, rapid response, and customization capabilities. With the expansion of domestic wafer fabs and increasing demands for supply chain security, the space for domestic equipment substitution continues to open up, but breakthroughs in high-end applications still require time and sustained R&D investment.

From a demand and opportunity perspective, the expansion of AI computing chips, advanced packaging, automotive-grade chips, and third-generation semiconductors will be the main sources of incremental growth in the coming years. At the same time, the demand for yield improvement and cost reduction from existing production lines is driving continued growth in the upgrade and repurchase market for testing equipment. Overall, wafer inspection and sorting equipment is a typical 'technology-intensive + high value-added' sector with long-term growth potential, but competition will become more concentrated among manufacturers with core optical, algorithm, and system integration capabilities.

This report studies the global Wafer Inspection and Sorting Equipment production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Wafer Inspection and Sorting Equipment total production and demand, 2021-2032, (Units)

Global Wafer Inspection and Sorting Equipment total production value, 2021-2032, (USD Million)

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

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

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

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

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

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

This report profiles key players in the global Wafer Inspection and Sorting Equipment 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 TZTEK, Komatsu NTC Ltd., Quantel, KLA, TT Vision Holdings Berhad, Quatek, Nordkete, Semilab, Isra Vision, Linton Crystal Technologies, 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 Sorting Equipment 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 Wafer Inspection and Sorting Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Wafer Inspection and Sorting Equipment Market, Segmentation by Type:

Geometric Parameter Detection and Sorting

Surface Defect Detection and Sorting

Electrical Performance Detection and Sorting

Others

Global Wafer Inspection and Sorting Equipment Market, Segmentation by Wafer Size:

Wafer Size: 12 inches

Wafer Size: 8 inches

Wafer Size: 6 inches

Global Wafer Inspection and Sorting Equipment Market, Segmentation by Detection Method:

Optical Defect Detection Equipment

Electron Beam Inspection Equipment

Electron Beam Testing and Sorting Equipment

Global Wafer Inspection and Sorting Equipment Market, Segmentation by Application:

Compound Semiconductors

Advanced Packaging

Others

**Companies Profiled:**

TZTEK

Komatsu NTC Ltd.

Quantel

KLA

TT Vision Holdings Berhad

Quatek

Nordkete

Semilab

Isra Vision

Linton Crystal Technologies

Autowell

Lead Intelligent

RKE

**Key Questions Answered:**

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

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