

Global Chips FIB Cross Section Analysis Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Chips FIB Cross Section Analysis market size is predicted to grow from US\$ 139 million in 2025 to US\$ 304 million in 2032; it is expected to grow at a CAGR of 10.8% from 2026 to 2032.

Memory chip FIB cross-section analysis refers to commercially delivered, site-specific sample preparation and structural characterisation services for DRAM, NAND Flash, NOR and embedded Flash, SRAM and emerging non-volatile memory devices. The service uses gallium FIB, xenon plasma FIB, multi-ion plasma FIB or hybrid bulk-removal and FIB-finishing workflows to expose selected structures within wafers, bare dice and packaged memory devices. Typical work covers two-dimensional cross-sections, large-area sections, serial-section three-dimensional reconstruction and preparation of electron-transparent lamellae for TEM or STEM. The analytical output may integrate SEM morphology, critical-dimension measurement, elemental analysis and electrical fault-localisation data to support structural verification, defect root-cause analysis, process development, yield improvement, competitive benchmarking and advanced microscopy preparation. The study focuses on paid third-party and contract-laboratory revenue generated from memory-device cross-section preparation and the associated analytical deliverables.

Key Findings DRAM and NAND account for most commercial analysis workloads East Asia anchors memory fabrication and analytical service demand Gallium FIB remains the mainstream site specific preparation route Plasma FIB gains share in large volume NAND analysis Failure localisation and yield improvement lead customer requirements **Market Trends** The market is moving from isolated two-dimensional images towards integrated, data-rich workflows that combine targeted milling, automated endpoint control, dimensional metrology, serial-section reconstruction and TEM

reference analysis. Increasing DRAM density, higher 3D NAND layer counts and the growth of HBM and hybrid-bonded packages are creating deeper targets and more complex buried interfaces. These changes favour high-current plasma FIB for rapid bulk removal, followed by low-damage finishing and high-resolution imaging. Automation is becoming more important because memory manufacturers require repeatable preparation across multiple sites rather than a single expert-created section. Automated defect re-detection, one-click extraction, recipe-based milling, drift correction and software-assisted three-dimensional reconstruction are reducing turnaround time and operator variability. At the same time, customers increasingly expect analytical reports to correlate physical cross-sections with electrical localisation, materials data and process history, shifting the service from stand-alone microscopy towards engineering decision support.

Market Dynamics Drivers Demand is supported by the continuing scaling of memory-cell geometries, increasing vertical integration, expanding HBM deployment and the need to identify buried defects rapidly during process development and yield ramp. FIB cross-sectioning is particularly valuable where mechanical methods cannot reach a precisely localised defect or where high-aspect-ratio structures require controlled material removal. The expansion of advanced memory fabrication and associated metrology workloads increases both the number of samples and the required analytical depth.

Restraints Growth is constrained by the high capital cost of dual-beam and plasma-FIB systems, the requirement for experienced operators and the time needed to prepare high-quality sections without redeposition, curtaining or beam-induced damage. Large memory manufacturers also maintain substantial in-house analytical capacity, limiting the share available to independent laboratories. Service economics can weaken when customers demand short turnaround, multiple target sites and extensive TEM or compositional work under a single fixed project fee.

Opportunities The strongest opportunities lie in high-volume automated analysis for 3D NAND and DRAM, HBM stack and hybrid-bonding interface evaluation, three-dimensional defect reconstruction and combined electrical-to-physical failure workflows. Regional laboratories positioned near wafer fabs and packaging clusters can capture urgent engineering work, while specialist providers can differentiate through large-volume plasma-FIB milling, low-damage TEM preparation, secure data handling and integrated interpretation across SEM, TEM and EDS.

Challenges The industry must manage rapid changes in device architecture, materials and target depth while maintaining comparable results across tools, sites and operators. A lack of universal preparation and reporting standards makes cross-laboratory comparison difficult. Additional risks include sample confidentiality, destructive-analysis limitations, long equipment lead times, scarce expert talent and the possibility that increased in-fab automation shifts routine work away from independent laboratories.

Industry Chain Analysis The upstream portion of the chain consists of FIB-SEM and PFIB instrument

suppliers, ion-source and column technologies, gas-injection systems, detectors, manipulators, sample holders, vacuum components and three-dimensional reconstruction software. These inputs determine milling rate, beam damage, achievable cross-section area, imaging resolution, automation and cost per completed target. The midstream consists of internal memory-manufacturer laboratories, independent failure-analysis laboratories, materials-analysis groups and reverse-engineering service providers. Their value creation comes from locating the correct defect, selecting an appropriate preparation route, controlling artefacts, combining multiple analytical techniques and converting images into an engineering conclusion. The downstream comprises memory IDMs, foundries, fabless designers, packaging and test providers, module manufacturers and electronic-system companies. Profitability is generally higher for urgent, site-specific and multi-technique projects than for routine image-only work, because the largest value contribution lies in specialist labour, interpretation and reduced customer time to root cause. Segment Insights DRAM and NAND Flash form the largest target-memory segments because they combine high production volumes with aggressive structural scaling and frequent requirements for process metrology and yield analysis. NAND generates growing demand for plasma-FIB and hybrid preparation because tall stacks and deep channels require larger material-removal volumes, while DRAM continues to require high-precision gallium-FIB sections and TEM lamellae around capacitors, transistors and dense interconnects. By analytical task, failure localisation and root-cause analysis hold the largest service share, followed by structural verification and process-development support. Advanced microscopy specimen preparation represents a smaller but higher-value segment because success depends on precise lift-out, controlled thinning and compatibility with downstream TEM or STEM analysis. Downstream Market Opportunities AI data centres and enterprise computing provide the clearest growth opportunity because HBM, server DRAM and enterprise NAND require high performance, advanced packaging and rapid yield learning. Mobile and consumer electronics remain a substantial volume base, while automotive, industrial and communications applications create attractive demand for reliability-oriented analysis and long-term failure investigation. Opportunities are strongest where the service provider can connect system-level symptoms with electrical localisation and a targeted physical cross-section, reducing repeated sample preparation and shortening the customer's corrective-action cycle. Regional Insights East Asia represents the largest production and service-demand region because advanced DRAM, NAND, packaging and electronics manufacturing are concentrated across major semiconductor clusters in the region. Proximity to fabs supports short-turnaround analytical laboratories and recurring process-development work. North America has a strong position in AI computing, advanced system design, reverse engineering and specialised semiconductor analysis, supporting higher-value

projects and complex cross-technique studies. Europe has a smaller manufacturing base but stable demand from automotive, industrial, aerospace and high-reliability electronics. Regional opportunity increasingly depends on local laboratory access, secure handling of customer samples and the ability to support global customers with consistent methods across multiple sites. Competitive Landscape Analysis Competition is fragmented across global testing groups, semiconductor-focused analytical laboratories, regional service providers and specialised reverse-engineering platforms. Global groups compete through laboratory networks, quality systems and established customer relationships, whereas specialist laboratories compete through advanced fault localisation, FIB, TEM and materials-analysis integration. Regional providers emphasise proximity and turnaround time, while reverse-engineering platforms differentiate through process knowledge and structured device databases. The market does not have a single dominant provider across all regions and tasks. Sustainable advantage depends on access to modern gallium and plasma-FIB capacity, experienced analysts, automation, high TEM-preparation success rates, secure data governance and the ability to translate physical evidence into actionable process or reliability conclusions.

Report Scope

LPI (LP Information)' newest research report, the "Chips FIB Cross Section Analysis Industry Forecast" looks at past sales and reviews total world Chips FIB Cross Section Analysis sales in 2025, providing a comprehensive analysis by region and market sector of projected Chips FIB Cross Section Analysis sales for 2026 through 2032. With Chips FIB Cross Section Analysis sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Chips FIB Cross Section Analysis industry.

This Insight Report provides a comprehensive analysis of the global Chips FIB Cross Section Analysis landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Chips FIB Cross Section Analysis portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chips FIB Cross Section Analysis market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chips FIB Cross Section Analysis and breaks down the forecast by Target Memory Technology, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on

hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Chips FIB Cross Section Analysis.

This report presents a comprehensive overview, market shares, and growth opportunities of Chips FIB Cross Section Analysis market by product type, application, key players and key regions and countries.

Segmentation by Target Memory Technology:

DRAM

NAND Flash

NOR and Embedded Flash

SRAM

Emerging Non-Volatile Memory

Other

Segmentation by Ion-Beam Preparation Route:

Gallium FIB

Xenon Plasma FIB

Non-Xenon Multi-Ion PFIB

Hybrid Bulk Removal and FIB Finishing

Other

Segmentation by Analysis Task:

Structural Verification and Metrology

Failure Localisation and Root-Cause Analysis

Process Development and Yield Improvement

Reverse Engineering and Benchmarking

Advanced Microscopy Specimen Preparation

Other

Segmentation by Application:

AI Data Centre and Enterprise Computing

Mobile Communications and Consumer Electronics

Automotive Electronics

Industrial Control and IoT

Telecommunications and Network Infrastructure

Aerospace and Defence Electronics

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Eurofins Scientific SE

SGS SA

Covalent Metrology

TechInsights Inc.

Spirit Electronics, Inc.

T?V NORD AG

Fraunhofer-Gesellschaft zur F?rderung der angewandten Forschung e. V.

NanoScope Services Ltd.

Seiko Group Corporation

Nippon Steel Corporation

Toray Industries, Inc.

TOSHIBA NANOANALYSIS CORPORATION

ITES Co., Ltd.

QRT Inc.

Techline Korea Co., Ltd.

Materials Analysis Technology Inc.

Integrated Service Technology Inc.

Winstek Semiconductor Corporation

Suzhou Sushi Testing Group Co., Ltd.

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