

Global Defect Review SEM Market Growth 2026-2032

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Abstracts

The global Defect Review SEM market size is predicted to grow from US\$ 736 million in 2025 to US\$ 1196 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

In 2024, the global Defect Review SEM production will reach 167 units, with an average selling price of 4,266 K USD/Unit.

Defect Review SEM belongs to the category of electron beam inspection equipment. In addition to DR-SEM, electron beam inspection equipment also includes electron beam defect inspection equipment (EBI).

Defect Review SEM SEM equipment is a high-end equipment that integrates the imaging function of traditional scanning electron microscope (SEM) and the automated defect review system. It is widely used in semiconductor wafer manufacturing, photomask inspection, and quality control in the production of high-precision devices. The equipment can perform high-resolution image acquisition and automatic identification of micro defects pre-marked by inspection equipment (such as inspection machines, defect detection systems), and realize the classification, analysis and recording of defect types, sizes, and morphologies. Compared with ordinary SEM, Review SEM usually has functions such as automatic navigation, high-throughput image acquisition, AI defect classification, and linkage with FAB production systems. It is an indispensable key tool for defect source tracing, process optimization, and yield improvement in wafer fabs.

At present, DR-SEM equipment for wafers accounts for the largest proportion, accounting for 90.7% of the market share in 2024. Among them, the main companies producing DR-SEM equipment for masks are Advantest and Japan's Holon, of which Holon is mainly sold in Japan. The global leading company of DR-SEM equipment for

wafers is Applied Materials, which accounted for more than 55% of the market in 2024. As Chinese local front-end measurement and testing equipment manufacturers gradually commercialize mass production, the growth rate of DR-SEM sales will exceed the global growth rate in the future.

From the production side, the core production areas of Review SEM equipment are mainly the United States and Japan, among which the United States is the most important production area, accounting for 66% of the market share in 2024. There are still large differences in the application, technology and product performance of Chinese electron beam detection and measurement equipment companies and international leading companies (such as Applied Materials and Hitachi High-Tech) in the field of advanced processes. However, as the localization process of Chinese local manufacturers accelerates, some Chinese local companies have also gained a certain market share in the electron beam detection and measurement equipment market, such as Shanghai Jingce and Jingce, among which Jingce focuses on CD-SEM equipment. In addition, in recent years, there have been many new entrants from Chinese local enterprises in the field of electron beam inspection and measurement equipment, such as Wellrun Microelectronics (EBI and CD-SEM), Suzhou Siscantech (EBI and CD-SEM), Suzhou Siscantech (CD-SEM), Wuxi Genxinyue Technology Co., Ltd (CD-SEM and DR-SEM), Suzhou AISTech (EBI) and Huayan Xince Semiconductor (Suzhou) Co., Ltd (EBI). However, at present, their scale is relatively small or some are still in the demo stage. With the development of China's semiconductor market in the future, it is expected that the global competition share of Chinese local manufacturers will gradually increase in the next few years, and China will maintain the fastest growth rate. With the advancement of domestic electron beam inspection and measurement equipment technology, the emergence of cost advantages and the strengthening of policy support, it is expected that by 2031, China's electron beam inspection and measurement equipment output share will reach 4.9%.

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

This Insight Report provides a comprehensive analysis of the global Defect Review SEM landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report

also analyzes the strategies of leading global companies with a focus on Defect Review SEM portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Defect Review SEM market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Defect Review SEM and breaks down the forecast by Type, 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 Defect Review SEM.

This report presents a comprehensive overview, market shares, and growth opportunities of Defect Review SEM market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

for 5-7nm Process

for 10-16nm Process

for 20-28nm Process

Others

Segmentation by Application:

Wafer

Mask

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 analysing the company's coverage, product portfolio, its market penetration.

Applied Materials

KLA

Hitachi High-Tech

Advantest

Holon Co., Ltd

Shanghai Jingce

DJEL

Key Questions Addressed in this Report

What is the 10-year outlook for the global Defect Review SEM market?

What factors are driving Defect Review SEM market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Defect Review SEM market opportunities vary by end market size?

How does Defect Review SEM break out by Type, by Application?

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