

# Global Electron Beam Defect Inspection and Measurement Equipment Market Growth 2026-2032

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## Abstracts

The global Electron Beam Defect Inspection and Measurement Equipment market size is predicted to grow from US\$ 3279 million in 2025 to US\$ 5203 million in 2032; it is expected to grow at a CAGR of 7.0% from 2026 to 2032.

The purpose of defect inspection is to accurately identify, locate and classify key defects (DOI, which refers to any defect type that is considered to have an impact on yield, reliability or performance) on the inspected wafer, thereby helping defect and yield engineers to quickly resolve defect problems, which is of great significance for wafer fabs to reduce production costs and improve wafer yield.

Electron Beam Metrology & Inspection Equipment plays a vital role in semiconductor manufacturing, and is mainly used for inspection of physical defects and electrical defects of wafers and integrated circuits, as well as the size Metrology of key graphics. These devices use electron beams to scan the wafers to be tested, obtain high-resolution electron beam images, and use different algorithms to analyze information such as defects and key dimensions on the wafers.

Electron Beam Metrology & Inspection Equipment includes three core equipments, each of which realizes precise control in semiconductor manufacturing through differentiated algorithms: DR-SEM performs sampling positioning based on the defect coordinates provided by optical detection, and completes defect authenticity identification and classification verification by collecting high-resolution SEM images; Electron beam wafer defect inspection equipment (EBI) adopts full scanning detection mode, batch acquires SEM images in the specified area according to the preset detection formula, and uses intelligent analysis algorithms to directly identify and classify micron to nanometer physical/potential defects; CD-SEM focuses on precise size control,

accurately reaches the preset measurement coordinates through the automatic focus system, and after collecting images of specific areas, uses pixel-level computing technology to achieve nanometer-level measurement of key structural parameters such as line width and aperture, and feeds back the measurement data to the process equipment in real time to form a closed-loop control. The three types of equipment respectively undertake the functions of defect review, comprehensive screening and precise measurement through algorithm optimization, and jointly build a quality assurance system for advanced semiconductor processes.

From the production side, the core production areas of Electron Beam Metrology & Inspection Equipment are mainly the United States, Europe, Japan and China, among which the United States is the main production area, accounting for 46.5% of the market share in 2024. There are still large differences between Chinese Electron Beam Metrology & Inspection Equipment companies and international leading companies (such as Applied Materials and Hitachi High-Tech) in the application, technology, and product performance of advanced support fields. 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 inspection and measurement equipment market, such as Jingce Electronic and DJEL. In addition, in recent years, there have been many new entrants from Chinese local enterprises, such as Wellrun Microelectronics, Suzhou Siscantech, Beijing Hengren, Wuxi Genxinyue Technology Co., Ltd, Suzhou AISTech, etc. However, at present, their scale is relatively small or some are still in the Demo stage. With the future development of China's semiconductor market, it is expected that the global competitive 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 China's Electron Beam Metrology & Inspection Equipment technology, the emergence of cost advantages and the strengthening of policy support, it is expected that the share will reach 4.9% in 2031.

In the future, as DRAM (high-bandwidth storage) and NAND technologies continue to become investment hotspots, the three-dimensional stacking architecture and performance limits of memory chips will place higher demands on semiconductor front-end Metrology & Inspection equipment. In order to meet the challenges of increased storage unit density and more complex processes, wafer inspection equipment needs to iterate to sub-nanometer precision and simultaneously develop full-dimensional inspection capabilities for defect location, material property analysis, and three-dimensional structure characterization. This technology upgrade that integrates optics, electron beams, and AI algorithms is becoming a key breakthrough direction for memory chip yield control and industry chain autonomy.

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

This Insight Report provides a comprehensive analysis of the global Electron Beam Defect Inspection and Measurement Equipment 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 Electron Beam Defect Inspection and Measurement Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Electron Beam Defect Inspection and Measurement Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Electron Beam Defect Inspection and Measurement Equipment 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 Electron Beam Defect Inspection and Measurement Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Electron Beam Defect Inspection and Measurement Equipment market by product type, application, key manufacturers and key regions and countries.

### **Segmentation by Type:**

Electron Beam Defect Inspection Equipment

Electron Beam Metrology Equipment

**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

Hitachi High-Tech

ASML

KLA

Advantest

Holon Co., Ltd

Wuhan Jingce Electronic Group

DJEL

Wellrun Microelectronics

Suzhou Siscantech

Beijing Hengren

Suzhou AISTech

Huayan Xince Semiconductor (Suzhou) Co., Ltd

### **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Electron Beam Defect Inspection and Measurement Equipment market?

What factors are driving Electron Beam Defect Inspection and Measurement Equipment market growth, globally and by region?

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

How do Electron Beam Defect Inspection and Measurement Equipment market opportunities vary by end market size?

How does Electron Beam Defect Inspection and Measurement Equipment break out by Type, by Application?

**The report requires updating with new data and is sent in 48 hours after order is placed.**

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