

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

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Abstracts

The global Logic Chips FIB Cross Section Analysis market size is predicted to grow from US\$ 156 million in 2025 to US\$ 311 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Logic Chips FIB Cross Section Analysis covers commercial, site-specific sample preparation, cross-sectional imaging, dimensional measurement and engineering interpretation services for logic wafers, bare dies, packaged integrated circuits and advanced semiconductor assemblies. The service uses a focused gallium ion beam, plasma ion beam or an integrated laser and ion-beam workflow to reach a defined region of interest, remove surrounding material, conduct precision finishing and expose internal structures for observation by scanning electron microscopy. Depending on the analytical task, the workflow may incorporate protective-layer deposition, CAD or layout-assisted navigation, elemental analysis, transmission electron microscopy lamella preparation, serial sectioning and three-dimensional reconstruction. The principal target structures are front-end active devices, middle-of-line contacts, back-end metal interconnects, die-to-package connections and package-substrate or three-dimensional interconnect structures. Commercial assignments support design verification, process development and yield improvement, physical failure root-cause analysis, post-reliability assessment, package-assembly qualification and selected circuit-edit or reverse-engineering verification tasks. Standard deliverables comprise prepared cross sections, annotated images, measurement data, defect interpretation, preparation records and an engineering analysis report.

Key Findings

Dual-beam FIB-SEM remains the core commercial service architecture

Back-end interconnect analysis forms the core recurring workload

AI computing creates the strongest incremental downstream demand

Plasma and laser workflows expand package-level analysis capacity

Asia-Pacific concentrates the deepest service and customer ecosystem

Market Trends

The market is shifting from isolated two-dimensional sectioning towards coordinated, site-specific failure-analysis workflows that preserve spatial context across several instruments. Electrical localisation, layout coordinates, X-ray microscopy and micro-CT increasingly identify buried regions before destructive preparation begins. Ultrafast laser processing or plasma FIB removes large volumes of package, substrate or overburden material, after which gallium FIB-SEM performs precise endpoint control, final polishing and nanoscale imaging. At the same time, real-time observation during milling and greater automation of TEM lamella preparation, serial imaging and three-dimensional reconstruction are improving repeatability and reducing dependence on manual intervention. Customer demand is also changing from the delivery of individual images towards integrated engineering evidence that connects electrical behaviour, physical structure, material composition and process history. These developments are especially relevant to leading-node logic, gate-all-around devices, chiplets, fine-pitch redistribution layers, hybrid bonding and other heterogeneous structures where the target is deeply buried and preparation-induced damage can obscure the original failure mechanism.

Market Dynamics

Drivers

Growth is being driven by continuing investment in advanced logic manufacturing, artificial-intelligence accelerators, high-performance computing and increasingly complex semiconductor packaging. Smaller device dimensions, gate-all-around architectures, denser back-end interconnects and heterogeneous integration increase the number of buried features and material interfaces that can influence yield, power consumption, performance and reliability. These structural changes make it more valuable to convert an electrical anomaly, layout coordinate or non-destructive inspection result into verified physical evidence. FIB cross-section analysis therefore

supports a wider range of decisions during process development, design-rule validation, yield ramp-up, package qualification, reliability testing and returned-device investigation. Expanding investment in advanced-node and 300 millimetre manufacturing also enlarges the engineering and production base that requires local failure-analysis capacity, while AI-related demand increases the commercial importance of rapid turnaround for high-value processors, accelerators and advanced package assemblies.

Restraints

The market is restrained by high equipment expenditure, specialised laboratory requirements, limited availability of experienced analysts and significant variation between sample structures. Logic chips and their packages may combine silicon, low-k dielectrics, copper, tungsten, barrier layers, solder, polymers and bonding materials with different milling rates and damage sensitivities. An inappropriate beam current, protective coating, incident angle or final-polishing condition can introduce curtaining, redeposition, amorphisation, thermal damage or geometric distortion that may be confused with a genuine process defect. Deeply buried targets and large package structures can also require several localisation and preparation stages before detailed imaging begins, reducing effective instrument throughput. Captive laboratories operated by major chip manufacturers, foundries and packaging companies retain a substantial volume of highly confidential and production-critical work, limiting the addressable outsourced market. Mechanical sectioning and broad ion-beam preparation also remain practical alternatives for large, non-site-specific areas where nanoscale targeting is not required.

Opportunities

The strongest opportunities lie in large-area plasma FIB, hybrid laser and plasma workflows, automated wafer-level preparation and correlative analysis linking electrical localisation, X-ray imaging, FIB-SEM and downstream TEM. These combinations allocate each preparation stage to the most suitable technology: non-destructive imaging identifies the target, laser processing provides rapid access through thick material, plasma FIB performs efficient bulk removal and gallium FIB completes high-precision finishing. Commercial laboratories can increase revenue per assignment by integrating dimensional metrology, EDS, crystallographic analysis, three-dimensional reconstruction, expert root-cause interpretation and repeatable multi-sample screening. Further opportunities are emerging from chiplet integration, hybrid bonding, fine-pitch interconnects, backside power delivery and other advanced structures where small alignment errors, interfacial defects or local mechanical-property changes can affect

device performance. Regional laboratories located near new logic fabs, packaging centres and AI-chip development clusters are also positioned to benefit where sample-security requirements and urgent delivery make long-distance shipment impractical.

Challenges

The principal long-term challenge is maintaining consistent analytical quality across instruments, analysts and laboratory locations while project complexity continues to increase. Service providers must establish reproducible rules for target definition, coordinate transfer, protective deposition, milling parameters, endpoint assessment, image acquisition, dimensional measurement and defect interpretation. They must also balance high instrument utilisation with the need to reserve capacity for urgent and unpredictable failure-analysis cases. Sample confidentiality, chain-of-custody records, data retention and restrictions on transferring advanced semiconductor devices between jurisdictions add further operational requirements. Automation can improve throughput and reduce operator variability, but it does not remove the need for expert supervision because preparation artefacts and actual device defects may have similar visual characteristics. Laboratories therefore need personnel who understand ion-beam interactions, electron microscopy, semiconductor process integration, package construction and electrical failure mechanisms, and the shortage of this combined expertise may constrain the speed at which new regional capacity becomes commercially effective.

Industry Chain Analysis

The upstream segment comprises FIB, plasma FIB and FIB-SEM equipment, ion columns and sources, electron-optical systems, detectors, vacuum modules, gas-injection and protective-deposition systems, sample stages, nanomanipulators, preparation holders, consumables and workflow software. Conventional gallium dual-beam systems provide precise site-specific milling, simultaneous SEM observation and preparation of electron-transparent lamellae. Plasma systems raise material-removal capacity for wider or deeper sections, while laser-assisted architectures accelerate access through thick packages before ion-beam finishing. EDS, TEM, STEM, X-ray microscopy and micro-CT broaden the workflow from basic morphology inspection to compositional, crystallographic and three-dimensional defect analysis. Equipment architecture, maintenance quality and software integration determine achievable positioning accuracy, cross-section fidelity, throughput and the range of deliverables that a laboratory can offer.

The midstream segment consists of independent failure-analysis laboratories, diversified testing groups, semiconductor-focused analysis specialists, equipment-affiliated service units and captive laboratories operated by manufacturers. Commercial value is created through project definition, defect localisation, sample preparation, beam-parameter optimisation, cross-sectional imaging, measurement, interpretation and communication of the physical root cause. The main cost components are equipment depreciation, maintenance contracts, laboratory infrastructure, specialist labour, consumables and unused capacity maintained for urgent work. Downstream customers include logic-chip design companies, foundries, integrated device manufacturers, packaging and testing providers, system manufacturers, reliability teams and research organisations. Profitability therefore depends less on raw milling volume than on target-hit accuracy, analyst productivity, turnaround time, report quality, confidentiality and the ability to combine several analytical methods within a single assignment.

Segment Insights

By instrument architecture, gallium FIB-SEM dual-beam services represent the commercial foundation because they combine precise site-specific milling with immediate electron imaging and support most front-end, middle-of-line and back-end assignments. Single-beam FIB systems retain specialist roles, but the absence of simultaneous SEM observation reduces their suitability for projects requiring continuous endpoint control and immediate structural interpretation. Plasma FIB-SEM and laser-assisted multimodal workflows form the principal expansion direction. Their advantage is not a replacement of gallium FIB precision, but the ability to remove larger material volumes and reach package-level or deeply buried targets more efficiently before precision finishing. As advanced packaging increases the distance between the external sample surface and the region of interest, demand is likely to shift towards laboratories capable of combining several architectures rather than relying on one instrument for every preparation stage.

By target structure, back-end metal interconnects and die-to-package connections form the core recurring workload because opens, shorts, voids, incomplete filling, misalignment and interface damage directly affect electrical operation. Front-end active devices and middle-of-line contacts generally require tighter localisation and lower-damage preparation because their dimensions are smaller and the distinction between a process defect and preparation artefact is more difficult to establish. Package-substrate and three-dimensional interconnect analysis is becoming more commercially important as logic products adopt redistribution layers, through-silicon vias, chiplets and hybrid bonding. By project objective, physical failure root-cause analysis and process or

yield improvement generate the most repeatable demand, while package-assembly qualification and post-reliability assessment gain importance as the number of material interfaces and vertical connections increases.

Downstream Market Opportunities

Data-centre and artificial-intelligence computing represents the strongest incremental opportunity because advanced processors and accelerators combine leading-node transistors, dense back-end interconnects and complex package architectures in products with high unit value and significant failure consequences. Consumer electronics remains a broad source of recurring assignments because short product cycles and high shipment volumes require rapid yield improvement and returned-device analysis. Automotive electronics creates high-value demand around long operating life, temperature exposure, vibration and traceable reliability evidence. Communications and networking equipment requires analysis of high-speed logic and interface structures, while industrial automation and robotics generate projects where physical failure analysis can reduce production downtime. Aerospace, defence and medical electronics represent smaller but technically demanding applications with stronger documentation, confidentiality and root-cause closure requirements. These application groups should be classified by the final equipment market of the analysed logic chip rather than by the laboratory technique or intermediate manufacturing stage.

Regional Insights

Asia-Pacific is the largest demand and service region in this study because mainland China, Taiwan, South Korea and Japan combine substantial logic manufacturing, advanced packaging, electronics production, semiconductor equipment and analytical-service capabilities. Taiwan has particularly strong exposure to leading-edge foundry and advanced-package projects, South Korea benefits from continuing semiconductor investment, mainland China combines large manufacturing capacity with localisation of testing and analytical services, and Japan maintains strong microscopy, materials and engineering capabilities. The concentration of fabs, packaging plants, design centres and equipment support networks creates recurring demand for laboratories that can return results rapidly and work directly with process and reliability engineers. Regional equipment-investment plans also indicate that China, South Korea and Taiwan will remain major centres of semiconductor capacity development, reinforcing the need for local failure-analysis support.

North America remains important for AI processors, logic design, advanced-device

development and high-value specialist failure analysis, while Europe has a diversified demand base linked to automotive, industrial, aerospace, defence and research-oriented semiconductor applications. Regional manufacturing policies and new fab or packaging investments are creating opportunities for additional local laboratories in both regions and in parts of Southeast Asia. A defensible fastest-growing regional ranking cannot be established because providers do not separately disclose comparable logic-chip FIB service revenue by geography. New equipment capacity should therefore not be treated as equivalent to immediate commercial market growth. A competitive regional ecosystem also requires skilled analysts, complementary localisation and microscopy tools, secure sample-handling systems and sufficient customer density to support short turnaround and sustainable equipment utilisation.

Competitive Landscape Analysis

The market is fragmented and expertise-led, with competition among large testing networks, semiconductor-focused failure-analysis specialists, equipment-affiliated analytical units and captive manufacturer laboratories. Large networks are positioned through geographic coverage, formal quality systems, broad analytical portfolios and the ability to provide consistent service to multinational customers. Regional specialists compete through shorter turnaround, detailed knowledge of local semiconductor processes and close interaction with design, process and reliability engineers. Equipment-affiliated units can introduce new preparation architectures and automation rapidly, while captive laboratories benefit from direct access to proprietary layouts, electrical results and process history. No reliable information supports a definitive global revenue ranking or market-share allocation among providers. Sustainable differentiation instead depends on target-hit rate, cross-method correlation, analyst experience, confidentiality, result repeatability and the ability to convert microscopy evidence into a defensible engineering conclusion rather than delivering images alone.

Report Scope

LPI (LP Information)' newest research report, the "Logic Chips FIB Cross Section Analysis Industry Forecast" looks at past sales and reviews total world Logic Chips FIB Cross Section Analysis sales in 2025, providing a comprehensive analysis by region and market sector of projected Logic Chips FIB Cross Section Analysis sales for 2026 through 2032. With Logic 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 Logic Chips FIB Cross Section Analysis industry.

This Insight Report provides a comprehensive analysis of the global Logic 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 Logic 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 Logic Chips FIB Cross Section Analysis market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Logic Chips FIB Cross Section Analysis and breaks down the forecast by Instrument Architecture, 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 Logic Chips FIB Cross Section Analysis.

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

Segmentation by Instrument Architecture:

Single-Beam FIB Type

Gallium FIB-SEM Dual-Beam Type

Plasma FIB-SEM Dual-Beam Type

Laser-Assisted PFIB-SEM Multimodal Type

Other

Segmentation by Primary Target Structure:

FEOL Active-Device Type

MOL Contact Type

BEOL Interconnect Type

Die-to-Package Interconnect Type

Package-Substrate and 3D-Interconnect Type

Other

Segmentation by Primary Project Objective:

Design Verification Type

Process Development and Yield Improvement Type

Physical Failure Root-Cause Type

Post-Reliability Assessment Type

Package Assembly Qualification Type

Circuit-Edit or Reverse-Engineering Type

Other

Segmentation by Application:

Data Centre and AI Computing

Consumer Electronics

Automotive Electronics

Communications and Networking

Industrial Automation and Robotics

Aerospace and Defence Electronics

Medical 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

Integrated Service Technology Inc.

Materials Analysis Technology Inc.

MSSCORPS Co., Ltd.

Wintech Nano (Suzhou) Co., Ltd.

QRT Inc.

SGS Soci?t? G?n?rale de Surveillance SA

Covalent Metrology Services Inc.

Advanced Circuit Engineers, LLC.

Spirit Electronics, Inc.

Cree Technologies, Inc.

NanoScope Services Ltd.

T?V NORD AG

Hitachi, Ltd.

Seiko Group Corporation

Nippon Steel Corporation

DENKEN Co., Ltd.

ITES Co., Ltd.

Toshiba Corporation

GRG Metrology & Test Group Co., Ltd.

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