

Global Logic Chips TEM Analysis Market Growth (Status and Outlook) 2026-2032

<https://marketpublishers.com/r/GCF6005D56DDEN.html>

Date: October 2026

Pages: 143

Price: US\$ 3,660.00 (Single User License)

ID: GCF6005D56DDEN

Abstracts

The global Logic Chips TEM Analysis market size is predicted to grow from US\$ 284 million in 2025 to US\$ 549 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Logic Chips TEM Analysis comprises commercial specimen-preparation, electron-microscopy and interpretation services used to characterise the nanoscale and atomic-scale structures of logic integrated circuits. The service typically combines site-specific focused ion beam lamella preparation with conventional TEM, high-resolution TEM, STEM, HAADF imaging, electron diffraction, TEM-EDS and EELS. Analysis is applied to FEOL transistor structures, MOL contacts, BEOL interconnects, substrates, backside power-delivery structures, process materials and logic-die packaging interfaces. Core functions include critical-dimension verification, crystallographic and elemental characterisation, process-deviation assessment, yield learning, failure root-cause determination, reliability support and technology benchmarking. Deliverables range from raw images and spectra to annotated metrology reports, structural and compositional interpretation, integrated failure-analysis conclusions and multi-sample comparative datasets. The market serves foundries, integrated device manufacturers, fabless logic companies, assembly and testing providers, semiconductor equipment and materials suppliers, independent laboratories and technical intelligence organisations.

Key Findings

Atomic-scale imaging is becoming standard for advanced logic failure analysis

Asia Pacific remains the principal service and demand centre

Failure root-cause analysis is the largest objective segment

TEM and EDS integration is gaining share in advanced-node projects

Data centres and AI infrastructure lead downstream demand growth

Market Trends

The market is moving from manually executed, image-centred projects towards automated and data-connected physical-analysis workflows. Advanced logic devices based on nanosheet gate-all-around transistors, increasingly dense contacts and backside power delivery require finer target localisation, thinner and less damaged lamellae, and combined imaging and elemental datasets. Automated grid handling, recipe generation, region-of-interest navigation and metrology are improving repeatability and throughput, while EDS and EELS are becoming more closely integrated with high-resolution STEM. Customers increasingly expect results to be delivered as engineering evidence that can be correlated with electrical fault isolation, process history and wafer-level metrology rather than as isolated microscopy images.

Market Dynamics

Drivers

Demand is supported by rapid growth in logic semiconductor value, higher investment in advanced-node manufacturing and the rising analytical intensity of each new device generation. Sub-3 nm structures, GAA transistors and backside power networks create new failure modes and reduce the effectiveness of conventional optical localisation. This increases the need for precise FIB preparation, atomic-scale imaging and elemental analysis across process development, yield improvement and production failure analysis.

Restraints

Market development is constrained by high instrument and facility costs, limited availability of experienced microscopists and failure-analysis engineers, and the destructive nature of specimen preparation. Throughput is also lower than mainstream in-line metrology, while specimen thickness, ion damage, contamination, drift and beam sensitivity can influence results. These factors make process control, quality review and repeat measurements essential.

Opportunities

The strongest opportunities arise from 2 nm and more advanced logic ramps, high-performance computing devices, chiplets, backside power delivery, hybrid bonding and new gate and interconnect materials. Providers can increase value by combining TEM with electrical fault isolation, FIB, SEM, surface analysis and statistical comparison. Automated high-volume TEM and secure remote collaboration can extend the service from individual investigations to recurring production and development programmes.

Challenges

The principal challenge is to maintain analytical accuracy while shortening turnaround times and increasing sample volume. Laboratories must also manage rapidly changing device architectures, cross-border sample logistics, customer confidentiality and consistency across multiple locations. Competitive differentiation requires both advanced equipment and a sufficiently deep knowledge base to interpret complex process interactions without overstating conclusions.

Industry Chain Analysis

Upstream value is created by TEM and FIB equipment, electron sources, detectors, analytical software, sample holders, grids, protective deposition materials, vacuum components and service infrastructure. The midstream combines project scoping, fault localisation, specimen preparation, TEM or STEM measurement, spectroscopy, data processing, technical review and report delivery. Downstream customers use the results to make process, design, supplier, reliability and intellectual-property decisions. Labour expertise, equipment depreciation and maintenance are the principal cost components, while the highest-value services are those that integrate multiple analytical techniques and convert physical observations into actionable root-cause or process conclusions.

Segment Insights

Failure root-cause analysis is expected to remain the largest analysis-objective segment because advanced logic defects increasingly require direct physical and elemental evidence after electrical localisation. Process development and verification should be the fastest-growing objective as nanosheet GAA, backside power and new interconnect schemes progress into higher-volume manufacturing. By technique, high-resolution TEM, STEM and TEM-EDS are gaining relative importance, while conventional TEM

remains essential for structural overview and efficient screening. Integrated failure-analysis reports and comparative datasets are expected to grow faster than raw-data-only delivery because customers increasingly require conclusions that can be incorporated directly into engineering decision workflows.

Downstream Market Opportunities

Data centres and AI infrastructure represent the strongest downstream opportunity through demand for CPUs, GPUs, AI accelerators, networking processors and custom compute silicon. Consumer electronics and personal computing remain important volume applications, while automotive, telecommunications, industrial automation, aerospace and medical electronics create demand where reliability and evidence quality are particularly important. Opportunities increasingly extend beyond isolated device failures to process qualification, supplier comparison, new-material validation and long-term monitoring of critical structures.

Regional Insights

Asia Pacific is the largest service and demand region because it contains the densest concentration of foundries, integrated device manufacturers, packaging operations and semiconductor supply-chain laboratories. Taiwan, Japan, mainland China and South Korea form the principal commercial analysis cluster. North America maintains strong demand from leading logic design, high-performance computing and technical intelligence activities and is adding advanced manufacturing capacity. Europe has a smaller but technically demanding market linked to industrial electronics, automotive, aerospace and research-intensive applications. Regional expansion will favour providers able to combine local turnaround with global methods, data security and quality consistency.

Competitive Landscape Analysis

The competitive landscape is fragmented across large multi-technique testing groups, specialist semiconductor analysis laboratories, technical intelligence providers and equipment companies offering commissioned analytical services. Market position depends less on the number of installed instruments than on target-localisation capability, lamella success rate, atomic-scale imaging and spectroscopy, turnaround time, interpretive depth and confidentiality. Larger networks benefit from broader technique coverage and geographic capacity, while specialists can compete through advanced-node experience and rapid project response. Continued investment in

automated TEM workflows and multi-location quality systems is likely to raise entry barriers without eliminating specialised providers.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Logic Chips TEM 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 TEM 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 TEM Analysis market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Logic Chips TEM Analysis and breaks down the forecast by Analysis Objective, 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 TEM Analysis.

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

Segmentation by Analysis Objective:

Process Development and Verification

Manufacturing Deviation and Yield Analysis

Failure Root-Cause Analysis

Reverse Engineering and Technology Benchmarking

Reliability and Qualification Support

Other

Segmentation by Analytical Technique:

Conventional TEM Imaging

High-Resolution TEM Imaging

STEM and HAADF Imaging

Electron Diffraction Analysis

TEM-EDS Elemental Analysis

EELS Analysis

Other

Segmentation by Analysis Layer:

FEOL Transistor Structures

MOL Contacts and Local Interconnects

BEOL Metal and Dielectric Interconnects

Substrate and Backside Structures

Advanced Packaging and Chiplet Interfaces

Process Materials and Test Structures

Other

Segmentation by Deliverable Depth:

Raw Data Delivery

Annotated Metrology Report

Structural and Compositional Interpretation Report

Integrated Failure Root-Cause Report

Statistical and Comparative Dataset

Other

Segmentation by Application:

Data Centers and AI Infrastructure

Consumer Electronics and Personal Computing

Automotive Electronics

Industrial Automation, Energy and Robotics

Telecommunications and Networking

Aerospace and Defense

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

TechInsights Inc.

Covalent Metrology Services, Inc.

EMSL Analytical, Inc.

MVA Scientific Consultants, Inc.

Nanowatts Technologies Pvt. Ltd.

NanoScope Services Ltd.

SERMA Group

Integrated Service Technology Inc.

Materials Analysis Technology Inc.

Scientific Gear Service Co., Ltd.

KONAS Co., Ltd.

TESCAN GROUP, a.s.

JEOL Ltd.

NTT, Inc.

Toray Industries, Inc.

Kobe Steel, Ltd.

NEC Corporation

Hitachi, Ltd.

Centre Testing International Group Co., Ltd.

Guangzhou GRG Metrology & Test Co., Ltd.

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