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Global Serial WAT Tester Market Growth 2026-2032

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Abstracts

The global Serial WAT Tester market size is predicted to grow from US$ 153 million in 2025 to US$ 344 million in 2032; it is expected to grow at a CAGR of 12.6% from 2026 to 2032.

A Serial WAT Tester is a type of wafer acceptance test equipment used in semiconductor manufacturing to monitor electrical parameters by sequentially measuring designated test structures on the wafer. Since it operates in a single-channel or limited-channel mode, it measures one structure at a time, resulting in relatively slower throughput. Serial WAT testers are mainly used in process development, engineering verification, yield analysis, and failure analysis, offering high flexibility and lower cost, though they are less efficient for high-volume production.In the upstream segment of the WAT tester industry chain, the key components include measurement modules, electrical modules, control modules, and connection modules. The measurement module is responsible for high-precision acquisition of electrical parameters from wafer test structures; the electrical module provides stable power supply and signal interfaces to ensure consistent test conditions; the control module enables automation of test processes; and the connection module ensures reliable contact between probes, test heads, and wafers. These critical modules are typically supplied by specialized electronics and automation vendors such as Hunan Tengfang Zhongke Technology, China Electronics System Engineering No. 2 Construction, Tokyo Electron Limited, Guangzhou Hontech Electronics, Arrow Electronics, PANGAEA, Suzhou Kangjufu Automation, Suzhou Sutinda Automation Technology, Suzhou Yinuoxing Precision Machinery, and Advanced Science and Novel Technology. The technological capability and quality of these upstream suppliers directly determine the accuracy and reliability of WAT testers. In 2024, the global production of Serial WAT Testers reached 264 units, with an average unit price of 519,000 USD.

Keysight Technologies remains the global leader in WAT testers, enjoying a de facto

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monopoly in the market. Its systems are widely adopted by major foundries due to their superior performance, reliability, and integration capabilities. In contrast, Chinese vendors like Semitronix (Guangliwei) and Semight Instruments (Lianxun) have only recently entered the WAT tester space. Semitronix began shipping a small number of systems post-2018, with pricing ranging from RMB 3.5 million to 5 million per unit, mainly targeting domestic second-tier fabs and research institutions. Semight remains in the early stages of market entry.

Looking forward, the WAT tester market is expected to evolve toward higher resolution, faster throughput, AI-enhanced analytics, and modular system design. Demand will grow not only in leading-edge nodes (7nm and below) but also in specialty segments like power devices and MEMS. Domestic Chinese players are gaining momentum, supported by national policy and increasing capital investment. While local equipment still lags behind Keysight in terms of performance and reliability, sustained efforts in R&D and field validation may enable gradual market penetration, particularly in less mission-critical applications.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Serial WAT Tester 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 Serial WAT Tester portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Serial WAT Tester market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Serial WAT Tester 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

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view of the current state and future trajectory in the global Serial WAT Tester.

This report presents a comprehensive overview, market shares, and growth opportunities of Serial WAT Tester market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Engineering WAT Tester

Production-support WAT Tester

Segmentation by Application:

Foundry

IDM

OSAT

Research and Academic Institutions

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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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.

Keysight

Tektronix

Semitronix

Semight

Key Questions Addressed in this Report

What is the 10-year outlook for the global Serial WAT Tester market?

What factors are driving Serial WAT Tester market growth, globally and by region?

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

How do Serial WAT Tester market opportunities vary by end market size?

How does Serial WAT Tester break out by Type, by Application?

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