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Global Wafer Film Thickness Metrology Tool Market Growth 2026-2032

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Abstracts

The global Wafer Film Thickness Metrology Tool market size is predicted to grow from US$ 792 million in 2025 to US$ 1080 million in 2032; it is expected to grow at a CAGR of 4.6% from 2026 to 2032.

A wafer film thickness metrology tool is a process-control system used in semiconductor wafer manufacturing to measure the thickness and within-wafer uniformity of single-layer or multilayer films, together with related optical or material parameters, through non-contact and non-destructive methods. These systems generally employ spectroscopic reflectometry, spectroscopic ellipsometry, optical interferometry, picosecond ultrasonics, or multisensor architectures. They collect reflected intensity, polarization changes, interference spectra, or acoustic responses and combine the resulting data with film-stack models, material optical-constant libraries, and fitting algorithms to determine film thickness distributions from the nanometer to millimeter range, as well as refractive index, extinction coefficient, acoustic velocity, elastic modulus, roughness, or composition. Available configurations include single-point benchtop instruments, automated two-dimensional mapping systems, fully automated cassette-to-cassette platforms, and integrated in-line metrology systems. They can support unpatterned monitor wafers, patterned product wafers, bonded wafers, warped wafers, and framed wafers. Typical uses include recipe development, tool matching, endpoint determination, uniformity assessment, statistical process control, and yield management for deposition, oxidation, photoresist coating, etching, chemical mechanical planarization, metallization, wafer thinning, and advanced packaging. Customers include logic and memory fabs, power and RF device manufacturers, advanced packaging facilities, wafer-material suppliers, research institutions, and semiconductor process-equipment manufacturers. Deliverables generally include the main system, automated handling modules, measurement heads, modeling and recipe

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software, reference wafers, data interfaces, application development, calibration services, maintenance, and long-term service agreements.

Wafer film thickness metrology is evolving from the delivery of a single thickness reading toward multiparameter process control for increasingly complex film stacks. Advanced logic and memory devices continue to introduce high-k materials, low-k materials, metal gates, hard masks, deep trenches, and multilayer structures, expanding the measurement target from transparent dielectrics to absorbing semiconductors, metals, and heterogeneous material combinations. Conventional single-wavelength or single-point measurements are therefore becoming less capable of simultaneously meeting requirements for range, speed, and model uniqueness. Spectroscopic reflectometry remains a fundamental solution with favorable cost and throughput, while spectroscopic ellipsometry can determine thickness and optical constants concurrently. Picosecond ultrasonics is suitable for opaque metallic films, optical interferometry and area imaging are effective for thicker films and rapid full-wafer distribution measurement, and multisensor platforms reduce parameter correlation through complementary signals. The value of a metrology system is no longer determined solely by nominal precision. Small measurement spots, pattern recognition, autofocus, model stability, tool-to-tool matching, long-term repeatability, edge-exclusion performance, warped-wafer compatibility, and real-time connectivity with factory automation and advanced process-control systems have become equally important. As process windows narrow, film-thickness data will play a deeper role in equipment adjustment, drift detection, virtual metrology, and closed-loop control, making software, model libraries, and application engineering major components of production value.

Demand growth is being driven by the simultaneous expansion of advanced process nodes, three-dimensional memory, power and RF devices, and advanced packaging. The transition of logic devices toward gate-all-around structures, backside power delivery, and more complex interconnects requires frequent monitoring of ultrathin dielectric layers, metal films, and stress-related layers. Continued increases in three-dimensional memory layer counts require metrology systems to address stacks containing tens or hundreds of layers, ultrathick hard masks, and optical-modeling challenges created by high-aspect-ratio structures. Silicon carbide, gallium nitride, RF filters, and MEMS devices are also expanding demand for measurements across different substrates, anisotropic materials, and thicker functional films. In advanced packaging, redistribution layers, photoresists, copper pillars, microbumps, through-silicon vias, bonding, and wafer thinning are accelerating the adoption of multisensor platforms, framed-wafer handling, and warpage compensation. Procurement decisions will increasingly consider measurement time per wafer, effective sampling density,

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automation level, recipe-transfer efficiency, tool matching, data integrity, and total cost of ownership rather than instrument precision alone. Benchtop research tools will remain important for material development and process validation, but higher-value growth will increasingly concentrate in automated and integrated platforms capable of cleanroom operation, standard communications, sustained production stability, and integration with yield-management systems. This development will further improve production yield and process stability.

The global supply structure combines concentration in high-end front-end platforms, fragmentation among specialized thin-film instrument suppliers, and accelerating localization. Suppliers in the United States, Israel, and Europe have accumulated strong capabilities in integrated optical metrology for advanced logic and memory, acoustic measurement of metal films, complex modeling software, and global service networks. Japanese suppliers maintain a stable foundation in spectroscopic ellipsometry, spectral interferometry, precision optics, and automated wafer handling. Chinese suppliers are expanding production validation and commercial deployment in dielectric-film metrology, metal-film metrology, optical critical-dimension measurement, and localized fab support. Competition will not be limited to hardware specifications. Leading suppliers will increase customer switching costs through sensor combinations, algorithms, reference-wafer systems, application databases, factory interfaces, and service responsiveness, while specialized suppliers can enter research, specialty-process, and mature-node markets with compact systems, small measurement spots, broad measurement ranges, customization, and lower cost. Production will remain concentrated in regions with strong precision optomechanical, spectroscopy, automation-control, and semiconductor application-engineering capabilities, while sales will closely follow investments in wafer fabrication, memory capacity, power semiconductors, and advanced packaging. Future opportunities will increasingly arise from multimodal sensing, high-speed full-wafer imaging, automated modeling of complex stacks, artificial-intelligence-assisted recipes, localized supply chains, and regional service systems, supporting continued long-term market expansion and technological upgrading.

Report Scope

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

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millions of the world Wafer Film Thickness Metrology Tool industry.

This Insight Report provides a comprehensive analysis of the global Wafer Film Thickness Metrology Tool 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 Wafer Film Thickness Metrology Tool portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Wafer Film Thickness Metrology Tool market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Wafer Film Thickness Metrology Tool and breaks down the forecast by Primary Measurement Principle, 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 Wafer Film Thickness Metrology Tool.

This report presents a comprehensive overview, market shares, and growth opportunities of Wafer Film Thickness Metrology Tool market by product type, application, key manufacturers and key regions and countries.

Segmentation by Primary Measurement Principle:

Spectroscopic Reflectometry Dominant

Spectroscopic Ellipsometry Dominant

Spectroscopic Interferometry Dominant

Picosecond Ultrasonics Dominant

Other

Segmentation by Automation and Deployment Topology:

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Manual Benchtop

Semi-Automated Mapping Workstation

Fully Automated Stand-Alone

Integrated or In-Line

Other

Segmentation by Spatial Sampling and Spot Size:

Macro-Spot Single-Point

Micro-Spot Single-Point

Ultra-Micro-Spot Single-Point

Point-Scanning Mapping

Area-Array Full-Field

Continuous In-Line Monitoring

Other

Segmentation by Measurement Output Package:

Thickness-Only Output

Thickness and Optical Parameters

Thickness and Mechanical Parameters

Thickness and Geometrical Topography

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Thickness and Composition or Structure

Other

Segmentation by Application:

Logic and Foundry Manufacturing

Memory Manufacturing

Advanced Packaging and Heterogeneous Integration

Power and Compound Semiconductor Manufacturing

MEMS and Sensor Manufacturing

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- 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.

- KLA Corporation

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Onto Innovation Inc.

Nova Ltd.

SCREEN Holdings Co., Ltd.

HORIBA, Ltd.

Hamamatsu Photonics K.K.

Otsuka Holdings Co., Ltd.

Lasertec Corporation

J.A. Woollam Co., Inc.

Semilab Zrt.

SENTECH Instruments GmbH

Film Sense, LLC

Gaertner Scientific Corporation

Semiconsoft, Inc.

Bruker Corporation

Angstrom Sun Technologies Inc.

Advanced Spectral Technology, Inc.

Camtek Ltd.

Merck KGaA

k-Space Associates, Inc.

Wuhan Jingce Electronic Group Co., Ltd.

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Shenzhen Skyverse Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Wafer Film Thickness Metrology Tool market?

What factors are driving Wafer Film Thickness Metrology Tool market growth, globally and by region?

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

How do Wafer Film Thickness Metrology Tool market opportunities vary by end market size?

How does Wafer Film Thickness Metrology Tool break out by Primary Measurement Principle, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Wafer Film Thickness Metrology Tool Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Wafer Film Thickness Metrology Tool by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Wafer Film Thickness Metrology Tool by Country/Region, 2021, 2025 & 2032
2.2 Wafer Film Thickness Metrology Tool Segment by Primary Measurement Principle
  2.2.1 Spectroscopic Reflectometry Dominant
  2.2.2 Spectroscopic Ellipsometry Dominant
  2.2.3 Spectroscopic Interferometry Dominant
  2.2.4 Picosecond Ultrasonics Dominant
  2.2.5 Other
  2.2.6 Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle
    2.2.6.1 Global Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
    2.2.6.2 Global Wafer Film Thickness Metrology Tool Revenue and Market Share by Primary Measurement Principle (2021-2026)
    2.2.6.3 Global Wafer Film Thickness Metrology Tool Sale Price by Primary Measurement Principle (2021-2026)
2.3 Wafer Film Thickness Metrology Tool Segment by Automation and Deployment Topology
  2.3.1 Manual Benchtop
  2.3.2 Semi-Automated Mapping Workstation
  2.3.3 Fully Automated Stand-Alone

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2.3.4 Integrated or In-Line
2.3.5 Other
2.3.6 Wafer Film Thickness Metrology Tool Sales by Automation and Deployment Topology
2.3.6.1 Global Wafer Film Thickness Metrology Tool Sales Market Share by Automation and Deployment Topology (2021-2026)
2.3.6.2 Global Wafer Film Thickness Metrology Tool Revenue and Market Share by Automation and Deployment Topology (2021-2026)
2.3.6.3 Global Wafer Film Thickness Metrology Tool Sale Price by Automation and Deployment Topology (2021-2026)
2.4 Wafer Film Thickness Metrology Tool Segment by Spatial Sampling and Spot Size
2.4.1 Macro-Spot Single-Point
2.4.2 Micro-Spot Single-Point
2.4.3 Ultra-Micro-Spot Single-Point
2.4.4 Point-Scanning Mapping
2.4.5 Area-Array Full-Field
2.4.6 Continuous In-Line Monitoring
2.4.7 Other
2.4.8 Wafer Film Thickness Metrology Tool Sales by Spatial Sampling and Spot Size
2.4.8.1 Global Wafer Film Thickness Metrology Tool Sales Market Share by Spatial Sampling and Spot Size (2021-2026)
2.4.8.2 Global Wafer Film Thickness Metrology Tool Revenue and Market Share by Spatial Sampling and Spot Size (2021-2026)
2.4.8.3 Global Wafer Film Thickness Metrology Tool Sale Price by Spatial Sampling and Spot Size (2021-2026)
2.5 Wafer Film Thickness Metrology Tool Segment by Measurement Output Package
2.5.1 Thickness-Only Output
2.5.2 Thickness and Optical Parameters
2.5.3 Thickness and Mechanical Parameters
2.5.4 Thickness and Geometrical Topography
2.5.5 Thickness and Composition or Structure
2.5.6 Other
2.5.7 Wafer Film Thickness Metrology Tool Sales by Measurement Output Package
2.5.7.1 Global Wafer Film Thickness Metrology Tool Sales Market Share by Measurement Output Package (2021-2026)
2.5.7.2 Global Wafer Film Thickness Metrology Tool Revenue and Market Share by Measurement Output Package (2021-2026)
2.5.7.3 Global Wafer Film Thickness Metrology Tool Sale Price by Measurement Output Package (2021-2026)

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2.6 Wafer Film Thickness Metrology Tool Segment by Application
2.6.1 Logic and Foundry Manufacturing
2.6.2 Memory Manufacturing
2.6.3 Advanced Packaging and Heterogeneous Integration
2.6.4 Power and Compound Semiconductor Manufacturing
2.6.5 MEMS and Sensor Manufacturing
2.6.6 Other
2.6.7 Wafer Film Thickness Metrology Tool Sales by Application
2.6.7.1 Global Wafer Film Thickness Metrology Tool Sale Market Share by Application (2021-2026)
2.6.7.2 Global Wafer Film Thickness Metrology Tool Revenue and Market Share by Application (2021-2026)
2.6.7.3 Global Wafer Film Thickness Metrology Tool Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Wafer Film Thickness Metrology Tool Breakdown Data by Company
3.1.1 Global Wafer Film Thickness Metrology Tool Annual Sales by Company (2021-2026)
3.1.2 Global Wafer Film Thickness Metrology Tool Sales Market Share by Company (2021-2026)
3.2 Global Wafer Film Thickness Metrology Tool Annual Revenue by Company (2021-2026)
3.2.1 Global Wafer Film Thickness Metrology Tool Revenue by Company (2021-2026)
3.2.2 Global Wafer Film Thickness Metrology Tool Revenue Market Share by Company (2021-2026)
3.3 Global Wafer Film Thickness Metrology Tool Sale Price by Company
3.4 Key Manufacturers Wafer Film Thickness Metrology Tool Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Wafer Film Thickness Metrology Tool Product Location Distribution
3.4.2 Players Wafer Film Thickness Metrology Tool Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

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4 WORLD HISTORIC REVIEW FOR WAFER FILM THICKNESS METROLOGY TOOL BY GEOGRAPHIC REGION

4.1 World Historic Wafer Film Thickness Metrology Tool Market Size by Geographic Region (2021-2026)
4.1.1 Global Wafer Film Thickness Metrology Tool Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Wafer Film Thickness Metrology Tool Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Wafer Film Thickness Metrology Tool Market Size by Country/Region (2021-2026)
4.2.1 Global Wafer Film Thickness Metrology Tool Annual Sales by Country/Region (2021-2026)
4.2.2 Global Wafer Film Thickness Metrology Tool Annual Revenue by Country/Region (2021-2026)
4.3 Americas Wafer Film Thickness Metrology Tool Sales Growth
4.4 APAC Wafer Film Thickness Metrology Tool Sales Growth
4.5 Europe Wafer Film Thickness Metrology Tool Sales Growth
4.6 Middle East & Africa Wafer Film Thickness Metrology Tool Sales Growth

5 AMERICAS

5.1 Americas Wafer Film Thickness Metrology Tool Sales by Country
5.1.1 Americas Wafer Film Thickness Metrology Tool Sales by Country (2021-2026)
5.1.2 Americas Wafer Film Thickness Metrology Tool Revenue by Country (2021-2026)
5.2 Americas Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026)
5.3 Americas Wafer Film Thickness Metrology Tool Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Wafer Film Thickness Metrology Tool Sales by Region
6.1.1 APAC Wafer Film Thickness Metrology Tool Sales by Region (2021-2026)
6.1.2 APAC Wafer Film Thickness Metrology Tool Revenue by Region (2021-2026)

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6.2 APAC Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026)
6.3 APAC Wafer Film Thickness Metrology Tool Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Wafer Film Thickness Metrology Tool by Country
  7.1.1 Europe Wafer Film Thickness Metrology Tool Sales by Country (2021-2026)
  7.1.2 Europe Wafer Film Thickness Metrology Tool Revenue by Country (2021-2026)
7.2 Europe Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026)
7.3 Europe Wafer Film Thickness Metrology Tool Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Wafer Film Thickness Metrology Tool by Country
  8.1.1 Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Wafer Film Thickness Metrology Tool Revenue by Country (2021-2026)
8.2 Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026)
8.3 Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel

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8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Wafer Film Thickness Metrology Tool
10.3 Manufacturing Process Analysis of Wafer Film Thickness Metrology Tool
10.4 Industry Chain Structure of Wafer Film Thickness Metrology Tool

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Wafer Film Thickness Metrology Tool Distributors
11.3 Wafer Film Thickness Metrology Tool Customer

12 WORLD FORECAST REVIEW FOR WAFER FILM THICKNESS METROLOGY TOOL BY GEOGRAPHIC REGION

12.1 Global Wafer Film Thickness Metrology Tool Market Size Forecast by Region
  12.1.1 Global Wafer Film Thickness Metrology Tool Forecast by Region (2027-2032)
  12.1.2 Global Wafer Film Thickness Metrology Tool Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Wafer Film Thickness Metrology Tool Forecast by Primary Measurement Principle (2027-2032)
12.7 Global Wafer Film Thickness Metrology Tool Forecast by Application (2027-2032)

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13 KEY PLAYERS ANALYSIS

13.1 KLA Corporation
13.1.1 KLA Corporation Company Information
13.1.2 KLA Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.1.3 KLA Corporation Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 KLA Corporation Main Business Overview
13.1.5 KLA Corporation Latest Developments
13.2 Onto Innovation Inc.
13.2.1 Onto Innovation Inc. Company Information
13.2.2 Onto Innovation Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.2.3 Onto Innovation Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Onto Innovation Inc. Main Business Overview
13.2.5 Onto Innovation Inc. Latest Developments
13.3 Nova Ltd.
13.3.1 Nova Ltd. Company Information
13.3.2 Nova Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.3.3 Nova Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Nova Ltd. Main Business Overview
13.3.5 Nova Ltd. Latest Developments
13.4 SCREEN Holdings Co., Ltd.
13.4.1 SCREEN Holdings Co., Ltd. Company Information
13.4.2 SCREEN Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.4.3 SCREEN Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 SCREEN Holdings Co., Ltd. Main Business Overview
13.4.5 SCREEN Holdings Co., Ltd. Latest Developments
13.5 HORIBA, Ltd.
13.5.1 HORIBA, Ltd. Company Information
13.5.2 HORIBA, Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.5.3 HORIBA, Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and

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Gross Margin (2021-2026)
13.5.4 HORIBA, Ltd. Main Business Overview
13.5.5 HORIBA, Ltd. Latest Developments
13.6 Hamamatsu Photonics K.K.
13.6.1 Hamamatsu Photonics K.K. Company Information
13.6.2 Hamamatsu Photonics K.K. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.6.3 Hamamatsu Photonics K.K. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Hamamatsu Photonics K.K. Main Business Overview
13.6.5 Hamamatsu Photonics K.K. Latest Developments
13.7 Otsuka Holdings Co., Ltd.
13.7.1 Otsuka Holdings Co., Ltd. Company Information
13.7.2 Otsuka Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.7.3 Otsuka Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Otsuka Holdings Co., Ltd. Main Business Overview
13.7.5 Otsuka Holdings Co., Ltd. Latest Developments
13.8 Lasertec Corporation
13.8.1 Lasertec Corporation Company Information
13.8.2 Lasertec Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.8.3 Lasertec Corporation Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Lasertec Corporation Main Business Overview
13.8.5 Lasertec Corporation Latest Developments
13.9 J.A. Woollam Co., Inc.
13.9.1 J.A. Woollam Co., Inc. Company Information
13.9.2 J.A. Woollam Co., Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.9.3 J.A. Woollam Co., Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 J.A. Woollam Co., Inc. Main Business Overview
13.9.5 J.A. Woollam Co., Inc. Latest Developments
13.10 Semilab Zrt.
13.10.1 Semilab Zrt. Company Information
13.10.2 Semilab Zrt. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications

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13.10.3 Semilab Zrt. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Semilab Zrt. Main Business Overview
13.10.5 Semilab Zrt. Latest Developments
13.11 SENTECH Instruments GmbH
13.11.1 SENTECH Instruments GmbH Company Information
13.11.2 SENTECH Instruments GmbH Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.11.3 SENTECH Instruments GmbH Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 SENTECH Instruments GmbH Main Business Overview
13.11.5 SENTECH Instruments GmbH Latest Developments
13.12 Film Sense, LLC
13.12.1 Film Sense, LLC Company Information
13.12.2 Film Sense, LLC Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.12.3 Film Sense, LLC Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Film Sense, LLC Main Business Overview
13.12.5 Film Sense, LLC Latest Developments
13.13 Gaertner Scientific Corporation
13.13.1 Gaertner Scientific Corporation Company Information
13.13.2 Gaertner Scientific Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.13.3 Gaertner Scientific Corporation Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Gaertner Scientific Corporation Main Business Overview
13.13.5 Gaertner Scientific Corporation Latest Developments
13.14 Semiconsoft, Inc.
13.14.1 Semiconsoft, Inc. Company Information
13.14.2 Semiconsoft, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.14.3 Semiconsoft, Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Semiconsoft, Inc. Main Business Overview
13.14.5 Semiconsoft, Inc. Latest Developments
13.15 Bruker Corporation
13.15.1 Bruker Corporation Company Information
13.15.2 Bruker Corporation Wafer Film Thickness Metrology Tool Product Portfolios

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and Specifications
13.15.3 Bruker Corporation Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Bruker Corporation Main Business Overview
13.15.5 Bruker Corporation Latest Developments
13.16 Angstrom Sun Technologies Inc.
13.16.1 Angstrom Sun Technologies Inc. Company Information
13.16.2 Angstrom Sun Technologies Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.16.3 Angstrom Sun Technologies Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Angstrom Sun Technologies Inc. Main Business Overview
13.16.5 Angstrom Sun Technologies Inc. Latest Developments
13.17 Advanced Spectral Technology, Inc.
13.17.1 Advanced Spectral Technology, Inc. Company Information
13.17.2 Advanced Spectral Technology, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.17.3 Advanced Spectral Technology, Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Advanced Spectral Technology, Inc. Main Business Overview
13.17.5 Advanced Spectral Technology, Inc. Latest Developments
13.18 Camtek Ltd.
13.18.1 Camtek Ltd. Company Information
13.18.2 Camtek Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.18.3 Camtek Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 Camtek Ltd. Main Business Overview
13.18.5 Camtek Ltd. Latest Developments
13.19 Merck KGaA
13.19.1 Merck KGaA Company Information
13.19.2 Merck KGaA Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.19.3 Merck KGaA Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Merck KGaA Main Business Overview
13.19.5 Merck KGaA Latest Developments
13.20 k-Space Associates, Inc.
13.20.1 k-Space Associates, Inc. Company Information

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13.20.2 k-Space Associates, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.20.3 k-Space Associates, Inc. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 k-Space Associates, Inc. Main Business Overview
13.20.5 k-Space Associates, Inc. Latest Developments
13.21 Wuhan Jingce Electronic Group Co., Ltd.
13.21.1 Wuhan Jingce Electronic Group Co., Ltd. Company Information
13.21.2 Wuhan Jingce Electronic Group Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.21.3 Wuhan Jingce Electronic Group Co., Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Wuhan Jingce Electronic Group Co., Ltd. Main Business Overview
13.21.5 Wuhan Jingce Electronic Group Co., Ltd. Latest Developments
13.22 Shenzhen Skyverse Technology Co., Ltd.
13.22.1 Shenzhen Skyverse Technology Co., Ltd. Company Information
13.22.2 Shenzhen Skyverse Technology Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
13.22.3 Shenzhen Skyverse Technology Co., Ltd. Wafer Film Thickness Metrology Tool Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Shenzhen Skyverse Technology Co., Ltd. Main Business Overview
13.22.5 Shenzhen Skyverse Technology Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Wafer Film Thickness Metrology Tool Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Wafer Film Thickness Metrology Tool Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Spectroscopic Reflectometry Dominant
Table 4. Major Players of Spectroscopic Ellipsometry Dominant
Table 5. Major Players of Spectroscopic Interferometry Dominant
Table 6. Major Players of Picosecond Ultrasonics Dominant
Table 7. Major Players of Other
Table 8. Global Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026) & (Units)
Table 9. Global Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
Table 10. Global Wafer Film Thickness Metrology Tool Revenue by Primary Measurement Principle (2021-2026) & ($ million)
Table 11. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Primary Measurement Principle (2021-2026)
Table 12. Global Wafer Film Thickness Metrology Tool Sale Price by Primary Measurement Principle (2021-2026) & (US$/Unit)
Table 13. Major Players of Manual Benchtop
Table 14. Major Players of Semi-Automated Mapping Workstation
Table 15. Major Players of Fully Automated Stand-Alone
Table 16. Major Players of Integrated or In-Line
Table 17. Major Players of Other
Table 18. Global Wafer Film Thickness Metrology Tool Sales by Automation and Deployment Topology (2021-2026) & (Units)
Table 19. Global Wafer Film Thickness Metrology Tool Sales Market Share by Automation and Deployment Topology (2021-2026)
Table 20. Global Wafer Film Thickness Metrology Tool Revenue by Automation and Deployment Topology (2021-2026) & ($ million)
Table 21. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Automation and Deployment Topology (2021-2026)
Table 22. Global Wafer Film Thickness Metrology Tool Sale Price by Automation and Deployment Topology (2021-2026) & (US$/Unit)
Table 23. Major Players of Macro-Spot Single-Point

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Table 24. Major Players of Micro-Spot Single-Point
Table 25. Major Players of Ultra-Micro-Spot Single-Point
Table 26. Major Players of Point-Scanning Mapping
Table 27. Major Players of Area-Array Full-Field
Table 28. Major Players of Continuous In-Line Monitoring
Table 29. Major Players of Other
Table 30. Global Wafer Film Thickness Metrology Tool Sales by Spatial Sampling and Spot Size (2021-2026) & (Units)
Table 31. Global Wafer Film Thickness Metrology Tool Sales Market Share by Spatial Sampling and Spot Size (2021-2026)
Table 32. Global Wafer Film Thickness Metrology Tool Revenue by Spatial Sampling and Spot Size (2021-2026) & ($ million)
Table 33. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Spatial Sampling and Spot Size (2021-2026)
Table 34. Global Wafer Film Thickness Metrology Tool Sale Price by Spatial Sampling and Spot Size (2021-2026) & (US$/Unit)
Table 35. Major Players of Thickness-Only Output
Table 36. Major Players of Thickness and Optical Parameters
Table 37. Major Players of Thickness and Mechanical Parameters
Table 38. Major Players of Thickness and Geometrical Topography
Table 39. Major Players of Thickness and Composition or Structure
Table 40. Major Players of Other
Table 41. Global Wafer Film Thickness Metrology Tool Sales by Measurement Output Package (2021-2026) & (Units)
Table 42. Global Wafer Film Thickness Metrology Tool Sales Market Share by Measurement Output Package (2021-2026)
Table 43. Global Wafer Film Thickness Metrology Tool Revenue by Measurement Output Package (2021-2026) & ($ million)
Table 44. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Measurement Output Package (2021-2026)
Table 45. Global Wafer Film Thickness Metrology Tool Sale Price by Measurement Output Package (2021-2026) & (US$/Unit)
Table 46. Global Wafer Film Thickness Metrology Tool Sale by Application (2021-2026) & (Units)
Table 47. Global Wafer Film Thickness Metrology Tool Sale Market Share by Application (2021-2026)
Table 48. Global Wafer Film Thickness Metrology Tool Revenue by Application (2021-2026) & ($ million)
Table 49. Global Wafer Film Thickness Metrology Tool Revenue Market Share by

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Application (2021-2026)
Table 50. Global Wafer Film Thickness Metrology Tool Sale Price by Application (2021-2026) & (US$/Unit)
Table 51. Global Wafer Film Thickness Metrology Tool Sales by Company (2021-2026) & (Units)
Table 52. Global Wafer Film Thickness Metrology Tool Sales Market Share by Company (2021-2026)
Table 53. Global Wafer Film Thickness Metrology Tool Revenue by Company (2021-2026) & ($ millions)
Table 54. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Company (2021-2026)
Table 55. Global Wafer Film Thickness Metrology Tool Sale Price by Company (2021-2026) & (US$/Unit)
Table 56. Key Manufacturers Wafer Film Thickness Metrology Tool Producing Area Distribution and Sales Area
Table 57. Players Wafer Film Thickness Metrology Tool Products Offered
Table 58. Wafer Film Thickness Metrology Tool Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 59. New Products and Potential Entrants
Table 60. Market M&A Activity & Strategy
Table 61. Global Wafer Film Thickness Metrology Tool Sales by Geographic Region (2021-2026) & (Units)
Table 62. Global Wafer Film Thickness Metrology Tool Sales Market Share Geographic Region (2021-2026)
Table 63. Global Wafer Film Thickness Metrology Tool Revenue by Geographic Region (2021-2026) & ($ millions)
Table 64. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Geographic Region (2021-2026)
Table 65. Global Wafer Film Thickness Metrology Tool Sales by Country/Region (2021-2026) & (Units)
Table 66. Global Wafer Film Thickness Metrology Tool Sales Market Share by Country/Region (2021-2026)
Table 67. Global Wafer Film Thickness Metrology Tool Revenue by Country/Region (2021-2026) & ($ millions)
Table 68. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Country/Region (2021-2026)
Table 69. Americas Wafer Film Thickness Metrology Tool Sales by Country (2021-2026) & (Units)
Table 70. Americas Wafer Film Thickness Metrology Tool Sales Market Share by

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Country (2021-2026)
Table 71. Americas Wafer Film Thickness Metrology Tool Revenue by Country (2021-2026) & ($ millions)
Table 72. Americas Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026) & (Units)
Table 73. Americas Wafer Film Thickness Metrology Tool Sales by Application (2021-2026) & (Units)
Table 74. APAC Wafer Film Thickness Metrology Tool Sales by Region (2021-2026) & (Units)
Table 75. APAC Wafer Film Thickness Metrology Tool Sales Market Share by Region (2021-2026)
Table 76. APAC Wafer Film Thickness Metrology Tool Revenue by Region (2021-2026) & ($ millions)
Table 77. APAC Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026) & (Units)
Table 78. APAC Wafer Film Thickness Metrology Tool Sales by Application (2021-2026) & (Units)
Table 79. Europe Wafer Film Thickness Metrology Tool Sales by Country (2021-2026) & (Units)
Table 80. Europe Wafer Film Thickness Metrology Tool Revenue by Country (2021-2026) & ($ millions)
Table 81. Europe Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026) & (Units)
Table 82. Europe Wafer Film Thickness Metrology Tool Sales by Application (2021-2026) & (Units)
Table 83. Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Country (2021-2026) & (Units)
Table 84. Middle East & Africa Wafer Film Thickness Metrology Tool Revenue Market Share by Country (2021-2026)
Table 85. Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Primary Measurement Principle (2021-2026) & (Units)
Table 86. Middle East & Africa Wafer Film Thickness Metrology Tool Sales by Application (2021-2026) & (Units)
Table 87. Key Market Drivers & Growth Opportunities of Wafer Film Thickness Metrology Tool
Table 88. Key Market Challenges & Risks of Wafer Film Thickness Metrology Tool
Table 89. Key Industry Trends of Wafer Film Thickness Metrology Tool
Table 90. Wafer Film Thickness Metrology Tool Raw Material
Table 91. Key Suppliers of Raw Materials

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Table 92. Wafer Film Thickness Metrology Tool Distributors List
Table 93. Wafer Film Thickness Metrology Tool Customer List
Table 94. Global Wafer Film Thickness Metrology Tool Sales Forecast by Region (2027-2032) & (Units)
Table 95. Global Wafer Film Thickness Metrology Tool Revenue Forecast by Region (2027-2032) & ($ millions)
Table 96. Americas Wafer Film Thickness Metrology Tool Sales Forecast by Country (2027-2032) & (Units)
Table 97. Americas Wafer Film Thickness Metrology Tool Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 98. APAC Wafer Film Thickness Metrology Tool Sales Forecast by Region (2027-2032) & (Units)
Table 99. APAC Wafer Film Thickness Metrology Tool Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 100. Europe Wafer Film Thickness Metrology Tool Sales Forecast by Country (2027-2032) & (Units)
Table 101. Europe Wafer Film Thickness Metrology Tool Revenue Forecast by Country (2027-2032) & ($ millions)
Table 102. Middle East & Africa Wafer Film Thickness Metrology Tool Sales Forecast by Country (2027-2032) & (Units)
Table 103. Middle East & Africa Wafer Film Thickness Metrology Tool Revenue Forecast by Country (2027-2032) & ($ millions)
Table 104. Global Wafer Film Thickness Metrology Tool Sales Forecast by Primary Measurement Principle (2027-2032) & (Units)
Table 105. Global Wafer Film Thickness Metrology Tool Revenue Forecast by Primary Measurement Principle (2027-2032) & ($ millions)
Table 106. Global Wafer Film Thickness Metrology Tool Sales Forecast by Application (2027-2032) & (Units)
Table 107. Global Wafer Film Thickness Metrology Tool Revenue Forecast by Application (2027-2032) & ($ millions)
Table 108. KLA Corporation Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 109. KLA Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 110. KLA Corporation Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 111. KLA Corporation Main Business
Table 112. KLA Corporation Latest Developments
Table 113. Onto Innovation Inc. Basic Information, Wafer Film Thickness Metrology

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Tool Manufacturing Base, Sales Area and Its Competitors
Table 114. Onto Innovation Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 115. Onto Innovation Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 116. Onto Innovation Inc. Main Business
Table 117. Onto Innovation Inc. Latest Developments
Table 118. Nova Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 119. Nova Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 120. Nova Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 121. Nova Ltd. Main Business
Table 122. Nova Ltd. Latest Developments
Table 123. SCREEN Holdings Co., Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 124. SCREEN Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 125. SCREEN Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 126. SCREEN Holdings Co., Ltd. Main Business
Table 127. SCREEN Holdings Co., Ltd. Latest Developments
Table 128. HORIBA, Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 129. HORIBA, Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 130. HORIBA, Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 131. HORIBA, Ltd. Main Business
Table 132. HORIBA, Ltd. Latest Developments
Table 133. Hamamatsu Photonics K.K. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 134. Hamamatsu Photonics K.K. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 135. Hamamatsu Photonics K.K. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 136. Hamamatsu Photonics K.K. Main Business
Table 137. Hamamatsu Photonics K.K. Latest Developments

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Table 138. Otsuka Holdings Co., Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 139. Otsuka Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 140. Otsuka Holdings Co., Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 141. Otsuka Holdings Co., Ltd. Main Business
Table 142. Otsuka Holdings Co., Ltd. Latest Developments
Table 143. Lasertec Corporation Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 144. Lasertec Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 145. Lasertec Corporation Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 146. Lasertec Corporation Main Business
Table 147. Lasertec Corporation Latest Developments
Table 148. J.A. Woollam Co., Inc. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 149. J.A. Woollam Co., Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 150. J.A. Woollam Co., Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 151. J.A. Woollam Co., Inc. Main Business
Table 152. J.A. Woollam Co., Inc. Latest Developments
Table 153. Semilab Zrt. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 154. Semilab Zrt. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 155. Semilab Zrt. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 156. Semilab Zrt. Main Business
Table 157. Semilab Zrt. Latest Developments
Table 158. SENTECH Instruments GmbH Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 159. SENTECH Instruments GmbH Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 160. SENTECH Instruments GmbH Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 161. SENTECH Instruments GmbH Main Business

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Table 162. SENTECH Instruments GmbH Latest Developments
Table 163. Film Sense, LLC Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 164. Film Sense, LLC Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 165. Film Sense, LLC Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 166. Film Sense, LLC Main Business
Table 167. Film Sense, LLC Latest Developments
Table 168. Gaertner Scientific Corporation Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 169. Gaertner Scientific Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 170. Gaertner Scientific Corporation Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 171. Gaertner Scientific Corporation Main Business
Table 172. Gaertner Scientific Corporation Latest Developments
Table 173. Semiconsoft, Inc. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 174. Semiconsoft, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 175. Semiconsoft, Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 176. Semiconsoft, Inc. Main Business
Table 177. Semiconsoft, Inc. Latest Developments
Table 178. Bruker Corporation Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 179. Bruker Corporation Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 180. Bruker Corporation Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 181. Bruker Corporation Main Business
Table 182. Bruker Corporation Latest Developments
Table 183. Angstrom Sun Technologies Inc. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 184. Angstrom Sun Technologies Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 185. Angstrom Sun Technologies Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 186. Angstrom Sun Technologies Inc. Main Business
Table 187. Angstrom Sun Technologies Inc. Latest Developments
Table 188. Advanced Spectral Technology, Inc. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 189. Advanced Spectral Technology, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 190. Advanced Spectral Technology, Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 191. Advanced Spectral Technology, Inc. Main Business
Table 192. Advanced Spectral Technology, Inc. Latest Developments
Table 193. Camtek Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 194. Camtek Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 195. Camtek Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 196. Camtek Ltd. Main Business
Table 197. Camtek Ltd. Latest Developments
Table 198. Merck KGaA Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 199. Merck KGaA Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 200. Merck KGaA Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 201. Merck KGaA Main Business
Table 202. Merck KGaA Latest Developments
Table 203. k-Space Associates, Inc. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 204. k-Space Associates, Inc. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 205. k-Space Associates, Inc. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 206. k-Space Associates, Inc. Main Business
Table 207. k-Space Associates, Inc. Latest Developments
Table 208. Wuhan Jingce Electronic Group Co., Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 209. Wuhan Jingce Electronic Group Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 210. Wuhan Jingce Electronic Group Co., Ltd. Wafer Film Thickness Metrology

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Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 211. Wuhan Jingce Electronic Group Co., Ltd. Main Business
Table 212. Wuhan Jingce Electronic Group Co., Ltd. Latest Developments
Table 213. Shenzhen Skyverse Technology Co., Ltd. Basic Information, Wafer Film Thickness Metrology Tool Manufacturing Base, Sales Area and Its Competitors
Table 214. Shenzhen Skyverse Technology Co., Ltd. Wafer Film Thickness Metrology Tool Product Portfolios and Specifications
Table 215. Shenzhen Skyverse Technology Co., Ltd. Wafer Film Thickness Metrology Tool Sales (Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 216. Shenzhen Skyverse Technology Co., Ltd. Main Business
Table 217. Shenzhen Skyverse Technology Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Wafer Film Thickness Metrology Tool
Figure 2. Wafer Film Thickness Metrology Tool Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Wafer Film Thickness Metrology Tool Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Wafer Film Thickness Metrology Tool Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Wafer Film Thickness Metrology Tool Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Wafer Film Thickness Metrology Tool Sales Market Share by Country/Region (2025)
Figure 10. Wafer Film Thickness Metrology Tool Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Spectroscopic Reflectometry Dominant
Figure 12. Product Picture of Spectroscopic Ellipsometry Dominant
Figure 13. Product Picture of Spectroscopic Interferometry Dominant
Figure 14. Product Picture of Picosecond Ultrasonics Dominant
Figure 15. Product Picture of Other
Figure 16. Global Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle in 2026
Figure 17. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Primary Measurement Principle (2021-2026)
Figure 18. Product Picture of Manual Benchtop
Figure 19. Product Picture of Semi-Automated Mapping Workstation
Figure 20. Product Picture of Fully Automated Stand-Alone
Figure 21. Product Picture of Integrated or In-Line
Figure 22. Product Picture of Other
Figure 23. Global Wafer Film Thickness Metrology Tool Sales Market Share by Automation and Deployment Topology in 2026
Figure 24. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Automation and Deployment Topology (2021-2026)
Figure 25. Product Picture of Macro-Spot Single-Point
Figure 26. Product Picture of Micro-Spot Single-Point

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Figure 27. Product Picture of Ultra-Micro-Spot Single-Point
Figure 28. Product Picture of Point-Scanning Mapping
Figure 29. Product Picture of Area-Array Full-Field
Figure 30. Product Picture of Continuous In-Line Monitoring
Figure 31. Product Picture of Other
Figure 32. Global Wafer Film Thickness Metrology Tool Sales Market Share by Spatial Sampling and Spot Size in 2026
Figure 33. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Spatial Sampling and Spot Size (2021-2026)
Figure 34. Product Picture of Thickness-Only Output
Figure 35. Product Picture of Thickness and Optical Parameters
Figure 36. Product Picture of Thickness and Mechanical Parameters
Figure 37. Product Picture of Thickness and Geometrical Topography
Figure 38. Product Picture of Thickness and Composition or Structure
Figure 39. Product Picture of Other
Figure 40. Global Wafer Film Thickness Metrology Tool Sales Market Share by Measurement Output Package in 2026
Figure 41. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Measurement Output Package (2021-2026)
Figure 42. Wafer Film Thickness Metrology Tool Consumed in Logic and Foundry Manufacturing
Figure 43. Global Wafer Film Thickness Metrology Tool Market: Logic and Foundry Manufacturing (2021-2026) & (Units)
Figure 44. Wafer Film Thickness Metrology Tool Consumed in Memory Manufacturing
Figure 45. Global Wafer Film Thickness Metrology Tool Market: Memory Manufacturing (2021-2026) & (Units)
Figure 46. Wafer Film Thickness Metrology Tool Consumed in Advanced Packaging and Heterogeneous Integration
Figure 47. Global Wafer Film Thickness Metrology Tool Market: Advanced Packaging and Heterogeneous Integration (2021-2026) & (Units)
Figure 48. Wafer Film Thickness Metrology Tool Consumed in Power and Compound Semiconductor Manufacturing
Figure 49. Global Wafer Film Thickness Metrology Tool Market: Power and Compound Semiconductor Manufacturing (2021-2026) & (Units)
Figure 50. Wafer Film Thickness Metrology Tool Consumed in MEMS and Sensor Manufacturing
Figure 51. Global Wafer Film Thickness Metrology Tool Market: MEMS and Sensor Manufacturing (2021-2026) & (Units)
Figure 52. Wafer Film Thickness Metrology Tool Consumed in Other

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Figure 53. Global Wafer Film Thickness Metrology Tool Market: Other (2021-2026) & (Units)
Figure 54. Global Wafer Film Thickness Metrology Tool Sale Market Share by Application (2025)
Figure 55. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Application in 2025
Figure 56. Wafer Film Thickness Metrology Tool Sales by Company in 2025 (Units)
Figure 57. Global Wafer Film Thickness Metrology Tool Sales Market Share by Company in 2025
Figure 58. Wafer Film Thickness Metrology Tool Revenue by Company in 2025 ($ millions)
Figure 59. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Company in 2025
Figure 60. Global Wafer Film Thickness Metrology Tool Sales Market Share by Geographic Region (2021-2026)
Figure 61. Global Wafer Film Thickness Metrology Tool Revenue Market Share by Geographic Region in 2025
Figure 62. Americas Wafer Film Thickness Metrology Tool Sales 2021-2026 (Units)
Figure 63. Americas Wafer Film Thickness Metrology Tool Revenue 2021-2026 ($ millions)
Figure 64. APAC Wafer Film Thickness Metrology Tool Sales 2021-2026 (Units)
Figure 65. APAC Wafer Film Thickness Metrology Tool Revenue 2021-2026 ($ millions)
Figure 66. Europe Wafer Film Thickness Metrology Tool Sales 2021-2026 (Units)
Figure 67. Europe Wafer Film Thickness Metrology Tool Revenue 2021-2026 ($ millions)
Figure 68. Middle East & Africa Wafer Film Thickness Metrology Tool Sales 2021-2026 (Units)
Figure 69. Middle East & Africa Wafer Film Thickness Metrology Tool Revenue 2021-2026 ($ millions)
Figure 70. Americas Wafer Film Thickness Metrology Tool Sales Market Share by Country in 2025
Figure 71. Americas Wafer Film Thickness Metrology Tool Revenue Market Share by Country (2021-2026)
Figure 72. Americas Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
Figure 73. Americas Wafer Film Thickness Metrology Tool Sales Market Share by Application (2021-2026)
Figure 74. United States Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)

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Figure 75. Canada Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 76. Mexico Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 77. Brazil Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 78. APAC Wafer Film Thickness Metrology Tool Sales Market Share by Region in 2025
Figure 79. APAC Wafer Film Thickness Metrology Tool Revenue Market Share by Region (2021-2026)
Figure 80. APAC Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
Figure 81. APAC Wafer Film Thickness Metrology Tool Sales Market Share by Application (2021-2026)
Figure 82. China Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 83. Japan Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 84. South Korea Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 85. Southeast Asia Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 86. India Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 87. Australia Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 88. China Taiwan Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 89. Europe Wafer Film Thickness Metrology Tool Sales Market Share by Country in 2025
Figure 90. Europe Wafer Film Thickness Metrology Tool Revenue Market Share by Country (2021-2026)
Figure 91. Europe Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
Figure 92. Europe Wafer Film Thickness Metrology Tool Sales Market Share by Application (2021-2026)
Figure 93. Germany Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 94. France Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($

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millions)
Figure 95. UK Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 96. Italy Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 97. Russia Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 98. Middle East & Africa Wafer Film Thickness Metrology Tool Sales Market Share by Country (2021-2026)
Figure 99. Middle East & Africa Wafer Film Thickness Metrology Tool Sales Market Share by Primary Measurement Principle (2021-2026)
Figure 100. Middle East & Africa Wafer Film Thickness Metrology Tool Sales Market Share by Application (2021-2026)
Figure 101. Egypt Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 102. South Africa Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 103. Israel Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 104. Turkey Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 105. GCC Countries Wafer Film Thickness Metrology Tool Revenue Growth 2021-2026 ($ millions)
Figure 106. Manufacturing Cost Structure Analysis of Wafer Film Thickness Metrology Tool in 2026
Figure 107. Manufacturing Process Analysis of Wafer Film Thickness Metrology Tool
Figure 108. Industry Chain Structure of Wafer Film Thickness Metrology Tool
Figure 109. Channels of Distribution
Figure 110. Global Wafer Film Thickness Metrology Tool Sales Market Forecast by Region (2027-2032)
Figure 111. Global Wafer Film Thickness Metrology Tool Revenue Market Share Forecast by Region (2027-2032)
Figure 112. Global Wafer Film Thickness Metrology Tool Sales Market Share Forecast by Primary Measurement Principle (2027-2032)
Figure 113. Global Wafer Film Thickness Metrology Tool Revenue Market Share Forecast by Primary Measurement Principle (2027-2032)
Figure 114. Global Wafer Film Thickness Metrology Tool Sales Market Share Forecast by Application (2027-2032)
Figure 115. Global Wafer Film Thickness Metrology Tool Revenue Market Share

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Forecast by Application (2027-2032)

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