

# Semiconductor Metrology & Inspection Equipment Market to Reach USD 12.36B by 2032 | Rising Demand and Innovations Growth

*Semiconductor Metrology and Inspection Equipment market is fueled by demand for advanced chip manufacturing and the miniaturization of semiconductor devices*

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## [Semiconductor Metrology and Inspection Equipment Market](#)

The Semiconductor Metrology and Inspection Equipment Market size was valued at USD 7.01 billion in 2023 and is expected to grow to USD 12.36 billion by 2032 and grow at a CAGR of 6.50 % over the forecast period of 2024-2032.

### Precision Technologies Shaping the Semiconductor Industry

The semiconductor metrology and inspection equipment market play a critical role in ensuring the accuracy, quality, and reliability of semiconductor devices. This sector has gained prominence due to the increasing demand for advanced technologies such as 5G, artificial intelligence, and IoT, all of which rely on high-performance semiconductors. Metrology and inspection tools are essential throughout the semiconductor manufacturing process, offering precise measurements and defect detection to maintain stringent quality standards. The market's growth is fueled by the rise in consumer electronics, the increasing adoption of advanced materials, and the need for miniaturized devices. Innovations in optical and electron microscopy, along with AI-driven inspection systems, are shaping the market landscape.

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Key Players Listed in Semiconductor Metrology and Inspection Equipment Market Are:





Semiconductor Metrology and Inspection Equipment market is increasing demand for high-performance chips, advancements in nanotechnology, & stringent quality control requirements in manufacturing”

*SNS Insider*

- Sumitomo Chemical Co., Ltd.
- BASF SE
- Air Products and Chemicals, Inc.
- Shin-Etsu Chemical Co., Ltd.
- Merck Group
- Tokyo Ohka Kogyo Co., Ltd. (TOK)
- Evonik Industries AG
- Cabot Microelectronics Corporation
- Dow Inc.
- Wacker Chemie AG
- Coherent, Inc.
- Laser Components GmbH

- Intel Corporation
- STMicroelectronics
- Broadcom Inc.
- Renesas Electronics Corporation
- Teledyne DALSA
- Omron Corporation
- Keyence Corporation
- Photon Systems, Inc.

## Rising Demand for Miniaturized and High-Performance Semiconductor Devices

The growing trend of device miniaturization and the demand for high-performance semiconductors are key drivers for this market. As industries such as telecommunications, automotive, and healthcare increasingly integrate semiconductor-based technologies, manufacturers are under pressure to produce smaller, faster, and more efficient chips. Miniaturization has heightened the complexity of manufacturing processes, necessitating highly precise metrology and inspection solutions. Advanced systems capable of detecting nanoscale defects and ensuring uniformity in production are critical to achieving these goals. This trend has propelled investments in cutting-edge technologies such as atomic force microscopy, X-ray inspection, and automated optical inspection systems, driving the market forward.

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Segment Analysis: Semiconductor Metrology and Inspection Equipment Dominates Market by Type

By Type: Lithography Metrology dominated the market in 2023 with a major market share due to its critical role in semiconductor production. It ensures the accuracy of patterns printed on

wafers, a fundamental step in chip manufacturing. As devices become more intricate, lithography metrology systems are evolving to handle smaller nodes and complex geometries. The adoption of EUV (extreme ultraviolet) lithography further highlights the segment's importance. Wafer inspection follows closely, driven by its role in identifying defects early in the manufacturing process, reducing costs, and improving yields. Thin film metrology and other process control systems also contribute significantly, supporting advanced applications like 3D ICs and MEMS.

Semiconductor Metrology and Inspection Equipment Market Key Segmentation:

By Type

- Lithography Metrology
- Overlay
- Dimension Equipment
- Mask Inspection and Metrology
- Wafer Inspection
- Thin Film Metrology
- Other Process Control Systems

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Regional Analysis:

North America dominated the semiconductor metrology and inspection equipment market in 2023 with a major market share, backed by its advanced technology infrastructure and significant investments in semiconductor R&D. Major players and research institutions in the U.S. drive innovation, particularly in emerging areas like 5G and AI. Applications in automotive electronics and defense further bolster market growth.

Asia-Pacific is anticipated to be the fastest-growing region during 2024-2032, supported by robust semiconductor manufacturing hubs in China, Taiwan, and South Korea. The region's focus on large-scale production, driven by rising consumer electronics demand and advancements in semiconductor miniaturization, underscores its dominant position. Collaborative initiatives and government incentives further enhance growth prospects.

Recent Developments

December 2023: Hitachi High-Tech introduced the GT2000 electron beam metrology system with high precision, enhancing semiconductor metrology and inspection capabilities. The GT2000 improves imaging for high-NA EUV resist wafers thanks to its ultra-low acceleration voltage and

rapid multi-point measurement capability.

August 2024: Camtek Ltd. revealed that it has secured over \$50 million in initial orders for its new Hawk product from multiple customers, with more orders expected soon. These orders are set to be delivered throughout 2025. The Hawk, built on an innovative new platform, tackles high-end Advanced Packaging technologies, featuring inspection and 3D measurement capabilities for wafers with 500 million micro bumps and Hybrid Bonding technology.

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