The top three metrology/inspection suppliers were KLA-Tencor, Hitachi High Tech, and Applied Materials.
The chart below shows the market share for each of the three companies from 2007 – 2012. For 2012, Applied Materials lost share to both KLA-Tencor and Hitachi High-Tech.

The three companies compete directly in only three sectors of the metrology/inspection market, and separately each company led one of these sectors:

- Hitachi High Tech led the CD-SEM inspection market with a 66.3%, in 2012.
- KLA-Tencor Wafer Defect Inspection led the market with a 56.5% share in 2012.
- Applied Materials led the SEM Defect Review market in 2012 with a 50.6%.

Market shares are dynamic. Applied Materials’ share of the SEM Defect Review market dropped from 60.9% in 2011 to 50.6% share in 2012, losing share to KLA-Tencor, whose share increased from 11.3% in 2011 to 22.7% share in 2012.

“For 2013, we expect Applied Materials to gain market share in the metrology/inspection market given the vendetta of CEO/President Gary Dickerson has toward KLA-Tencor for passing over his promotion to CEO when he worked there,” added Dr. Castellano. “However, we feel that this emphasis on a patterned wafer inspection market of only $1.8 billion, which represents only 6% of the $28 billion wafer processing equipment market, will negatively impact Applied’s share in its deposition/etch markets against a combined Lam Research/Novellus powerhouse.”

The Information Network is a leading consulting and market research company addressing the semiconductor, LCD, HDD, nano, and solar industries.
There are no coincidences