

# Global Semiconductor Equipment Market: Analysis By Segment, By Supply Chain, By Dimension, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026

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## Abstracts

In 2021, the global semiconductor equipment market, was valued at US\$104.65 billion, and is probable to reach US\$167.78 billion by 2026.

Semiconductor equipment are used to in the making of semiconductors and integrated circuits, which are utilized in the manufacturing of several different industries such as medical, banking, telecommunication, automobile, etc., which directly increased the demand for semiconductor equipment. The semiconductor equipment market is projected to grow at a CAGR of 9.90%, during the forecast period of 2022-2026.

Market Segmentation Analysis:

**By Segment:** The report splits the global semiconductor equipment market into three different segments: Wafer equipment, Assembly and packaging equipment and Test equipment. The wafer equipment segment accounted for majority of approximately 86% of the semiconductor equipment market in 2021. In the future, the demand for silicon wafers and equipment footprints would aid in the analysis of the semiconductor wafer fab equipment market. Furthermore, advancements in wafer technologies that have resulted in 'denser packaging' of devices such as MEMS (micro-electro-mechanical system) and transistors are expected to lay the groundwork for new opportunities that companies can capitalize on. The global wafer semiconductor equipment market can be further divided into four segments: Logic, NAND, DRAM and Others.

**By Supply Chain:** The market report has bifurcated the global semiconductor equipment

market into three segments on the basis of supply chain: IDM, OSAT, and Foundry. IDM segment held almost half of the share in semiconductor equipment market in 2021, while the same segment is the fastest growing during the forecast period, as IDM Semiconductor equipment market is expected to enhance their Integrated Circuit (IC) production capacity, the companies are partnering with semiconductor manufacturing equipment providers.

**By Dimensions:** The semiconductor equipment market report has categorized the global market into three segments on the basis of dimensions: 2D, 2.5D and 3D. 2.5D dimension packaging held approximately 36% of the share in semiconductor equipment market in 2021. The fastest growing segment is 3D dimensions due to heavy investments on the R&D by many key players, including Amkor Technology, ASE group, Silicon ware Precision Industries Co., Ltd., and others, leading to the improvement in advanced packaging techniques.

**By Region:** According to this report, the global semiconductor equipment market can be divided into four major regions, on the basis of geographical areas: Asia Pacific (China, Japan, Taiwan and South Korea), North America (The US, Mexico, and Canada), Europe (Germany, UK, France, Italy and Rest of Europe) and Rest of the World. The Asia Pacific semiconductor equipment market enjoyed the major share of 84.5% in 2021, primarily owing to the dominance of China, Taiwan, South Korea, which are the Asia-Pacific most attractive market for semiconductor equipment. Europe and North America are considered the emerging market for semiconductor equipment.

China is the world's largest semiconductor equipment market. China's semiconductor equipment market is expected to achieve solid growth, underpinned by high foundry capex expectations driven by rising demand; technology process development, where more equipment investment is needed; memory process development; photovoltaic demand driven by environmental production; and rising demand in LEDs, MEMS, power devices, and advanced packaging. It is believed semiconductor localization would remain one of China's most important national goals, and, as a result, domestic players stand to gain market share over the next few years.

#### Global Semiconductor Equipment Market Dynamics:

**Growth Drivers:** Semiconductor Equipment industry is mounting due to the cumulative consumption of electronics industry. Semiconductor chips, which are used as components in power devices, compactness optical sensors, and light emitters, are the basic requirement for the manufacture of these smart electronic devices. Further, the

market is expected to increase due to rapid urbanization, increased use of semiconductors in medical devices, rising government support, mounting usage of semiconductor equipment in Gaming industry, etc. in recent years.

**Challenges:** The tension between the U.S. and China has resulted in a possible decoupling between the two economies. The U.S. is developing new strategies to prevent itself from falling further behind China in chip manufacturing as trade tensions continue to grow. This is a foremost challenge faced by semiconductor equipment industry. Additionally, other factors like, functional defects and complexities, high cost associated, etc. are some challenges to the market.

**Trends:** A major trend gaining pace in semiconductor equipment market is the launch of 5G network, which would connect and support the massive surge of current and future wireless data. Data centers and devices require smaller, stronger semiconductors with extremely high transmission rates that can also store massive amounts of embedded memory as network traffic and complexity grow exponentially. More trends in the market are believed to augment the growth of semiconductor equipment market during the forecasted period include sustainability, emerging industrial robotics, surging demand for electronic vehicles and increasing demand for artificial intelligence, etc.

**Impact Analysis of COVID-19 and Way Forward:**

During the pandemic, semiconductor equipment manufacturers witnessed a fall for a very short period of time as lockdown was imposed suddenly. While in the second half of 2020 and after that, the semiconductor equipment market sharply increased exceeding the fall due to acceleration of global economies' digital transformation as pandemic has boosted the digitalization. Increased use of electronic devices due to online classes and work from home, indirectly increased the demand for semiconductor equipment as these devices need semiconductors and integrated circuits to be installed in them, which are manufactured from semiconductor equipment. Competitive

**Landscape and Recent Developments:**

The market for semiconductor equipment is concentrated with top five players accounted for more than 60% share. Chinese players accounted for less than 5% of the global market share, although they are expanding quickly. China domestic players are well-positioned for the semiconductor localization trend. Most of China's semiconductor equipment market share has been taken up by global leaders, who have absolute competitive edge in technology and customer base. Chinese players have been making good progress in R&D and customer verification, and have market share gain potentials

in mid-to-low-end products.

Further, key players of the semiconductor equipment market are:

Applied Materials Inc.

ASML Holding Semiconductor Company

Tokyo Electron Limited

Lam Research Corporation

KLA Corporation

Teradyne Inc.

Screen Holding Co. Ltd

Advantest Corporation

Hitachi High Tech Corporation

ASM International N.V

Nikon Corporation

Canon Inc.

## Scope of the Report

The report titled “Global Semiconductor Equipment Market: Analysis By Segment, By Supply Chain, By Dimension, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2026”, includes:

An in-depth analysis of the global semiconductor equipment market by value, by segment, by supply chain, by dimension, by region, etc.

The regional analysis of the semiconductor equipment market, including the

following regions:

Asia Pacific (Japan, China, Taiwan and South Korea)

North America (The US, Mexico and Canada)

Europe (Germany, UK, France, Italy and Rest of Europe)

Rest of the World

Comprehensive information about emerging markets. This report analyses the market for various segments across geographies.

Provides an analysis of the COVID-19 impact on the global semiconductor equipment market, with post COVID impact analysis.

Assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall semiconductor equipment market has also been forecasted for the period 2022-2026, taking into consideration the previous growth patterns, the growth drivers, and the current and future trends.

Evaluation of the potential role of semiconductor equipment to improve the market status.

Identification of new technological developments, R&D activities, and collaborations occurring in the semiconductor equipment market.

In-depth profiling of the key players, including the assessment of the business overview, market strategies, regional and business segments of the leading players in the market.

The recent developments, mergers and acquisitions related to mentioned key players are provided in the market report.

The in-depth analysis provides an insight into the market, underlining the growth rate and opportunities offered in the business.

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