

Global 12-Inch Wafer Dicing Machine Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GC23615015C5EN.html>

Date: January 2026

Pages: 117

Price: US\$ 4,480.00 (Single User License)

ID: GC23615015C5EN

Abstracts

The global 12-Inch Wafer Dicing Machine market size is expected to reach \$ 731 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

In 2025, global production of 12-inch wafer dicing machines reached 940 units, with an average selling price of \$501,240 per unit. The 12-inch wafer dicing machine is a key piece of equipment in the semiconductor back-end process, used to precisely dice 300 mm wafers into individual chips after they have been coated, framed, or fixed on a vacuum adsorption stage. In a 300mm production line scenario, the key capability of a '12-inch dicing machine' is not just the dicing body itself, but the automation and consistency of the entire process: FOUP/bundle loading, vision alignment, closed-loop depth/height measurement, blade wear and compensation, post-cutting cleaning and particle control, and SECS/GEM/MES integration. Ultimately, delivery metrics are yield (chipping/cracks/particles), throughput (UPH/cycle time), OEE, and TCO. The upstream of the industry chain includes precision motion control: direct drive/servo platforms, encoders, guide rails, controllers and vibration/thermal drift suppression; spindle systems: high-speed, high-rigidity spindles, bearings and dynamic balancing; key consumables: diamond blades/grinding wheels, dicing tape and frames; midstream is complete machine manufacturing; and downstream serves wafer fabs, packaging and testing plants, and their automation/cleanroom/data system integrators. Gross profit margins are typically around 30%-50%.

The 12-inch wafer dicing machine is a field with extremely high technological barriers, a highly concentrated market, and a profound impact on high-end chip manufacturing. Future development will closely revolve around three main axes: 'more precise, more intelligent, and more adaptable to new materials and new packaging.' The Asia-Pacific region is the largest market, driven primarily by the massive chip manufacturing and packaging capacity of mainland China and Taiwan. The North American and European

markets are mainly driven by demand from state-of-the-art logic chip manufacturing and automotive power semiconductors. Japanese companies hold a dominant position, while the market share of Chinese domestic manufacturers is beginning to increase.

This report studies the global 12-Inch Wafer Dicing Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 12-Inch Wafer Dicing Machine and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 12-Inch Wafer Dicing Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 12-Inch Wafer Dicing Machine total production and demand, 2021-2032, (Units)
Global 12-Inch Wafer Dicing Machine total production value, 2021-2032, (USD Million)
Global 12-Inch Wafer Dicing Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global 12-Inch Wafer Dicing Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: 12-Inch Wafer Dicing Machine domestic production, consumption, key domestic manufacturers and share

Global 12-Inch Wafer Dicing Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global 12-Inch Wafer Dicing Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global 12-Inch Wafer Dicing Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global 12-Inch Wafer Dicing Machine market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Disco Corporation, Tokyo Seimitsu, ADT (Advanced Dicing Technologies), GL TECH, Jiangsu Jingchuang Advanced Electronic Technology, Shenyang Heyan Technology, Han's Laser Technology, Suzhou Maxwell Technologies, Shenzhen Tensun Precision Equipment, BJCORE, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 12-Inch Wafer Dicing Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 12-Inch Wafer Dicing Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 12-Inch Wafer Dicing Machine Market, Segmentation by Type:

Single Spindle

Dual Spindle

Global 12-Inch Wafer Dicing Machine Market, Segmentation by Automation Level:

Fully Automatic

Semi-Automatic

Global 12-Inch Wafer Dicing Machine Market, Segmentation by Technical Principle:

Abrasive Wheel Dicing

Laser Dicing

Global 12-Inch Wafer Dicing Machine Market, Segmentation by Application:

CIS

MEMS

Power Devices

Advanced Packaging

Others

Companies Profiled:

Disco Corporation

Tokyo Seimitsu

ADT (Advanced Dicing Technologies)

GL TECH

Jiangsu Jingchuang Advanced Electronic Technology

Shenyang Heyan Technology

Han's Laser Technology

Suzhou Maxwell Technologies

Shenzhen Tensun Precision Equipment

BJCORE

CETC Beijing Electronic Equipment

Hefei Accuracy Intelligent Equipment

Hi-Test

Wuxi Autowell Technology

Strong Laser (Dong Guan) Equipment

Key Questions Answered:

1. How big is the global 12-Inch Wafer Dicing Machine market?
2. What is the demand of the global 12-Inch Wafer Dicing Machine market?
3. What is the year over year growth of the global 12-Inch Wafer Dicing Machine market?
4. What is the production and production value of the global 12-Inch Wafer Dicing Machine market?
5. Who are the key producers in the global 12-Inch Wafer Dicing Machine market?
6. What are the growth factors driving the market demand?

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