

Global Backside Power Delivery Process Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GB4A1778F565EN.html>

Date: August 2026

Pages: 156

Price: US\$ 3,480.00 (Single User License)

ID: GB4A1778F565EN

Abstracts

According to our (Global Info Research) latest study, the global Backside Power Delivery Process Equipment market size was valued at US\$ 676 million in 2025 and is forecast to a readjusted size of US\$ 2541 million by 2032 with a CAGR of 15.2% during review period.

Backside power delivery process equipment is a wafer-level process equipment portfolio for advanced logic chip manufacturing. Its core task is to form a stable power delivery network on the backside of the chip after transistor and signal interconnect formation through temporary wafer bonding, backside thinning, backside patterning, dielectric etching, barrier and seed layer deposition, copper or other metal filling, chemical mechanical planarization, wet cleaning, annealing, defect inspection, and metrology control. This equipment category addresses the challenges of conventional frontside power delivery, including routing resource consumption, signal interconnect congestion, voltage drop, and increasing power management complexity. It allows more frontside metal layers to serve signal transmission and provides a manufacturing foundation with higher density, lower resistance, and improved thermal-electrical coordination for high-performance computing, artificial intelligence processors, advanced mobile processors, and next-generation foundry logic nodes.

The industrial value of backside power delivery process equipment comes from a fundamental change in the power delivery architecture of advanced logic chips. As transistor density increases, frontside metal layers must support both signal interconnects and power delivery networks, leading to greater routing congestion, voltage drop, parasitic effects, and power management complexity. By moving part of the power delivery network to the wafer backside, more frontside metal resources can

be allocated to high-speed signal interconnects, creating a new optimization space among chip area, power consumption, and performance. Therefore, this equipment category is not a single new tool in the traditional sense, but a structural source of incremental demand within advanced-node manufacturing systems. It will drive demand across wafer support, thinning, etching, deposition, electroplating, planarization, cleaning, and inspection and metrology equipment, while also pushing equipment suppliers from standalone tool delivery toward process coordination and line-level qualification. As advanced logic nodes continue to ramp for artificial intelligence, high-performance computing, and mobile processors, equipment demand for backside power delivery is expected to move gradually from R&D lines and pilot lines into mass-production configurations, creating capital expenditure opportunities over multiple years.

From a process difficulty perspective, backside power delivery imposes higher requirements on equipment stability, cross-process matching, and process control. After frontside structures are completed, wafers need to undergo temporary bonding and backside thinning, and any warpage, breakage, adhesive residue, or thickness non-uniformity may affect subsequent backside opening and metal interconnect quality. Backside etching must achieve controlled openings in complex structures, thin-film deposition must ensure consistent coverage of barrier layers, dielectric layers, and seed layers, electrochemical deposition must deliver metal fill with low defects, low resistance, and high uniformity, while CMP and cleaning must remove excess material while controlling scratches, particles, and residues. Because these steps are highly coupled, tool selection will place greater emphasis on process windows, inline metrology, defect tracking, and yield feedback loops. Suppliers with multi-process platforms, core chamber technologies, chemical process understanding, and joint qualification capabilities with customers will be better positioned to enter mass-production supply chains, while single-tool performance alone will not be sufficient to support customer decisions.

From a competitive landscape perspective, backside power delivery process equipment will continue to show both global specialization and regional reinforcement. Suppliers in the United States, Japan, Europe, and South Korea have long accumulated strengths in lithography, etching, deposition, thinning, cleaning, CMP, bonding, and inspection and metrology, making them important sources of supply when advanced logic customers introduce new processes. At the same time, equipment companies in mainland China have built product portfolios in etching, deposition, cleaning, electroplating, CMP, coater and developer, and wet processing tools. As local wafer fabs raise their requirements for complete advanced process chains, related domestic equipment may gain more opportunities in qualification lines and selected mass-production steps. Future industry

growth will come not only from an increase in tool shipments, but also from greater process complexity, including more chambers, more metrology stations, more cleaning steps, stronger software control, and expanded maintenance services. Overall, this field is a long-term incremental market driven by the upgrade of advanced logic manufacturing, with competition focused on yield, supply security, process qualification speed, and customer collaboration capability.

This report is a detailed and comprehensive analysis for global Backside Power Delivery Process Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Pattern Formation Method and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Backside Power Delivery Process Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Backside Power Delivery Process Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Backside Power Delivery Process Equipment market size and forecasts, by Pattern Formation Method and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Backside Power Delivery Process Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Backside Power Delivery Process Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Backside Power Delivery Process Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Applied Materials, Inc., Lam Research Corporation, KLA Corporation, ASML Holding N.V., EV Group, SUSS MicroTec SE, ASM International N.V., DISCO Corporation, Tokyo Electron Limited, SCREEN Holdings Co., Ltd., etc.

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

Market Segmentation

Backside Power Delivery Process Equipment market is split by Pattern Formation Method and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Pattern Formation Method, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Pattern Formation Method

Lithographic Pattern Formation

Plasma Etch Pattern Formation

Wet Etch Pattern Formation

Market segment by Removal Target

Particle Removal

Organic Residue Removal

Metal Residue Removal

Dielectric Residue Removal

Edge Film Removal

Market segment by Process Stage

Carrier Wafer Support

Wafer Thinning

Backside Opening

Insulation and Barrier Formation

Metal Interconnect Formation

Surface Preparation

Inspection and Metrology

Market segment by Application

Advanced Logic Backside Power Delivery

Thin Wafer Processing

Backside Opening Formation

Other

Major players covered

Applied Materials, Inc.

Lam Research Corporation

KLA Corporation

ASML Holding N.V.

EV Group

SUSS MicroTec SE

ASM International N.V.

DISCO Corporation

Tokyo Electron Limited

SCREEN Holdings Co., Ltd.

EBARA Corporation

Canon Inc.

Nikon Corporation

SEMES Co., Ltd.

Jusung Engineering Co., Ltd.

PSK Inc.

NAURA Technology Group Co., Ltd.

Advanced Micro-Fabrication Equipment Inc. China

ACM Research (Shanghai), Inc.

Hwatsing Technology Co., Ltd.

Piotech Inc.

KINGSEMI Co., Ltd.

Onto Innovation Inc.

Nova Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Backside Power Delivery Process Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Backside Power Delivery Process Equipment, with price, sales quantity, revenue, and global market share of Backside Power Delivery Process Equipment from 2021 to 2026.

Chapter 3, the Backside Power Delivery Process Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Backside Power Delivery Process Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Pattern Formation Method and by Application, with sales market share and growth rate by Pattern Formation Method, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Backside Power Delivery Process Equipment market forecast, by regions, by Pattern Formation Method, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Backside Power Delivery Process Equipment.

Chapter 14 and 15, to describe Backside Power Delivery Process Equipment sales channel, distributors, customers, research findings and conclusion.

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