

Global Backside Power Delivery Process Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Backside Power Delivery Process Equipment market size is expected to reach \$ 2541 million by 2032, rising at a market growth of 15.2% CAGR during the forecast period (2026-2032).

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 studies the global Backside Power Delivery Process Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Backside Power Delivery Process Equipment 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 Backside Power Delivery Process Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Backside Power Delivery Process Equipment total production and demand, 2021-2032, (Units)

Global Backside Power Delivery Process Equipment total production value, 2021-2032, (USD Million)

Global Backside Power Delivery Process Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Backside Power Delivery Process Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Backside Power Delivery Process Equipment domestic production, consumption, key domestic manufacturers and share

Global Backside Power Delivery Process Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Backside Power Delivery Process Equipment production by Pattern Formation Method, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Backside Power Delivery Process Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Backside Power Delivery Process Equipment 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Backside Power Delivery Process Equipment 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 Pattern Formation Method, 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 Backside Power Delivery Process Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Backside Power Delivery Process Equipment Market, Segmentation by Pattern Formation Method:

Lithographic Pattern Formation

Plasma Etch Pattern Formation

Wet Etch Pattern Formation

Global Backside Power Delivery Process Equipment Market, Segmentation by Removal Target:

Particle Removal

Organic Residue Removal

Metal Residue Removal

Dielectric Residue Removal

Edge Film Removal

Global Backside Power Delivery Process Equipment Market, Segmentation by Process Stage:

Carrier Wafer Support

Wafer Thinning

Backside Opening

Insulation and Barrier Formation

Metal Interconnect Formation

Surface Preparation

Inspection and Metrology

Global Backside Power Delivery Process Equipment Market, Segmentation by Application:

Advanced Logic Backside Power Delivery

Thin Wafer Processing

Backside Opening Formation

Other

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Backside Power Delivery Process Equipment market?
2. What is the demand of the global Backside Power Delivery Process Equipment market?
3. What is the year over year growth of the global Backside Power Delivery Process Equipment market?
4. What is the production and production value of the global Backside Power Delivery Process Equipment market?
5. Who are the key producers in the global Backside Power Delivery Process Equipment market?
6. What are the growth factors driving the market demand?

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