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Global Dicing Blades for Semiconductor Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Dicing Blades for Semiconductor Packaging market size is expected to reach $ 108 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

Dicing blades for semiconductor packaging are circular precision tools mounted on high-speed dicing saw spindles to mechanically cut molded semiconductor package strips, assembled substrates, panels, or reconstituted wafers into individual packaged devices. The blades generally consist of diamond abrasives embedded in electroformed nickel, resin, or sintered metal bonds and are mainly supplied as hubless annular blades, hub blades, or steel-core composite blades. The cutting-edge thickness of core commercial products generally ranges from approximately 50 to 750 micrometers. Products between 50 and 300 micrometers are primarily used for precision package singulation, while blades between 300 and 750 micrometers are mainly applied to thicker package materials, deep cutting, and high-load processing.

These blades are primarily used for the singulation of ball grid array packages, land grid array packages, quad-flat no-lead packages, dual-flat no-lead packages, chip-scale packages, system-in-package products, wafer-level packages, light-emitting diode packages, and selected power semiconductor packages. The blades must process combinations of epoxy molding compounds, copper leadframes, package substrates, metal pads, and dielectric materials while maintaining package dimensions, minimizing burrs, chipping, and delamination, and supporting long blade life and high-volume throughput. The category excludes blades used exclusively for bare semiconductor wafer dicing, ingot slicing blades, wafer thinning wheels, general printed circuit board routing blades, and laser or plasma singulation equipment.

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In 2025, global production of dicing blades for semiconductor packaging reached approximately 1.05 million to 1.15 million pieces, while the weighted FOB price of mainstream products ranged from approximately USD 58 to USD 64 per piece. Standard electroformed nickel-bond and resin-bond hubless blades were mainly concentrated within this range, while sintered metal blades, steel-core composite blades, and customized products for wettable-flank packages, high-copper-content materials, narrow kerfs, or high-speed deep cutting generally commanded higher unit prices.

Opportunities and Core Market Drivers

The expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, automotive electronics, industrial controls, and power semiconductors is increasing semiconductor package volumes, package complexity, and back-end processing requirements. Advanced packaging is progressively adopting chiplet integration, fan-out packaging, wafer-level packaging, and heterogeneous integration, while conventional packages continue to move toward smaller footprints, reduced thicknesses, higher terminal density, and tighter dimensional tolerances. Singulation processes must therefore cut increasingly complex combinations of molding compounds, copper leadframes, package substrates, and metal pads. Narrower cutting streets, smaller package dimensions, and the growing use of wettable-flank structures are raising requirements for reduced copper burrs, lower resin chipping, limited delamination, and consistent kerf width, supporting demand for high-rigidity sintered blades, precision resin-bond blades, slotted cooling structures, and blades designed for step-cut processes.

Industry Chain and Downstream Demand Trends

The upstream supply chain includes synthetic diamond powders, high-purity nickel and nickel salts, resin systems, metal-bond powders, steel cores, and precision hubs. Midstream manufacturing processes include abrasive classification, electroforming, molding and curing, powder sintering, steel-core construction, precision dressing, dynamic balancing, and qualification with package materials. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, light-emitting diode manufacturers, and power semiconductor packaging companies. Because blade performance directly affects package dimensions, copper burr formation, molding-compound chipping, interfacial delamination, and final electrical reliability, products generally require extended qualification for specific molding compounds, copper thicknesses, substrate structures,

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and dicing saw platforms.

Future competition will increasingly focus on cost per cutting length, radial blade wear, replacement frequency, equipment utilization, and total production yield rather than initial unit price alone. Laser and plasma singulation technologies will expand in selected high-density advanced packaging applications. Mechanical dicing blades, however, are expected to retain substantial productivity, equipment compatibility, and cost advantages in ball grid array, quad-flat no-lead, land grid array, power semiconductor, and high-volume mature package singulation.

This report studies the global Dicing Blades for Semiconductor Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Dicing Blades for Semiconductor Packaging 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 Dicing Blades for Semiconductor Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Dicing Blades for Semiconductor Packaging total production and demand, 2021-2032, (Million Pcs)
Global Dicing Blades for Semiconductor Packaging total production value, 2021-2032, (USD Million)
Global Dicing Blades for Semiconductor Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs), (based on production site)
Global Dicing Blades for Semiconductor Packaging consumption by region & country, CAGR, 2021-2032 & (Million Pcs)
U.S. VS China: Dicing Blades for Semiconductor Packaging domestic production, consumption, key domestic manufacturers and share
Global Dicing Blades for Semiconductor Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Pcs)
Global Dicing Blades for Semiconductor Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)
Global Dicing Blades for Semiconductor Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)

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This report profiles key players in the global Dicing Blades for Semiconductor Packaging 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, Asahi Diamond Industrial Co., Ltd., Tokyo Seimitsu Co., Ltd., Kulicke and Soffa Industries, Inc., Keteca Singapore Pte. Ltd., Saint-Gobain S.A., Thermocarbon Inc., UKAM Industrial Superhard Tools, YMB Co., Ltd., EHWA DIAMOND INDUSTRIAL 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 Dicing Blades for Semiconductor Packaging market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Million Pcs) and average price (US$/Pcs) 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 Dicing Blades for Semiconductor Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Global Dicing Blades for Semiconductor Packaging Market, Segmentation by Type:

Resin Bond

Sintered Metal Bond

Electroformed Nickel Bond

Others

Global Dicing Blades for Semiconductor Packaging Market, Segmentation by End Use Industry:

Consumer Electronics and Computing

Automotive Electronics

Communications Electronics

Others

Global Dicing Blades for Semiconductor Packaging Market, Segmentation by Blade Structure:

Hubless Annular Blades

Hub Blades

Steel-Core Composite Blades

Global Dicing Blades for Semiconductor Packaging Market, Segmentation by Blade Thickness:

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Below 150 Micrometers

150 to 299 Micrometers

300 to 750 Micrometers

Others

Global Dicing Blades for Semiconductor Packaging Market, Segmentation by Application:

QFN and DFN Packages

BGA and LGA Packages

Wafer-Level and Fan-Out Packages

Others

Companies Profiled:

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Tokyo Seimitsu Co., Ltd.

Kulicke and Soffa Industries, Inc.

Keteca Singapore Pte. Ltd.

Saint-Gobain S.A.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

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YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

KINIK COMPANY

NDS TAIWAN CO., LTD.

GL Tech Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

WINTIME Semiconductor Technology Co., Ltd.

Zhengzhou Research Institute for Abrasives and Grinding Co., Ltd.

Nanjing Sanchao Advanced Materials Co., Ltd.

Zhejiang Xiste Technology Co., Ltd.

Key Questions Answered:
1. How big is the global Dicing Blades for Semiconductor Packaging market?
2. What is the demand of the global Dicing Blades for Semiconductor Packaging market?
3. What is the year over year growth of the global Dicing Blades for Semiconductor Packaging market?
4. What is the production and production value of the global Dicing Blades for Semiconductor Packaging market?
5. Who are the key producers in the global Dicing Blades for Semiconductor Packaging market?
6. What are the growth factors driving the market demand?

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Contents

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3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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4 UNITED STATES VS CHINA VS REST OF THE WORLD

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7 MARKET ANALYSIS BY BLADE STRUCTURE

8 MARKET ANALYSIS BY BLADE THICKNESS

9 MARKET ANALYSIS BY APPLICATION

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info@marketpublishers.com

10 COMPANY PROFILES

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11 INDUSTRY CHAIN ANALYSIS

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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