

Global Etching Equipment for Solar Cell Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Etching Equipment for Solar Cell market size is expected to reach \$ 1543 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

Etching equipment for solar cells is a key surface treatment system used in the manufacturing of crystalline silicon, thin-film, and emerging photovoltaic cells. It mainly addresses issues such as saw damage removal from wafers, surface microstructure texturing, removal of phosphosilicate glass or borosilicate glass after diffusion, edge isolation, removal of backside oxide layers and polysilicon wraparound, internal series-connection patterning for thin-film cells, and subsequent cleanliness control. This type of equipment typically adopts technical approaches such as alkaline wet etching, acidic wet etching, single-side water-film protection, batch tank processing, inline chain processing, dry-in/dry-out wet chemical processing, plasma dry etching, and laser scribing. It ensures process uniformity, throughput, and yield through chemical circulation, temperature control, transfer and positioning, drying, exhaust treatment, and automated loading and unloading. Typical applications cover PERC, TOPCon, HJT, BC, perovskite, CIGS, and tandem cell production lines. Main customers include photovoltaic cell manufacturers, turnkey equipment integrators, thin-film cell companies, and R&D or pilot-line institutions.

The industrial value of etching equipment for solar cells is expanding from simple material-removal equipment into a core surface-engineering platform for high-efficiency cell manufacturing. After wafer slicing, crystalline silicon cells require wet processes to remove saw damage and form low-reflectance textured surfaces. After diffusion, deposition, and passivation, they also require removal of phosphosilicate glass, borosilicate glass, backside oxide layers, polysilicon wraparound, and edge parasitic

junctions. As N-type technologies such as TOPCon, HJT, and BC become mainstream, conventional low-complexity wet cleaning tools are no longer sufficient to meet requirements for higher selectivity, greater throughput, lower breakage, and reduced chemical consumption. Equipment competition is therefore shifting toward process-window control, transfer-system stability, liquid-distribution uniformity, single-side protection, automated loading and unloading, and production-line takt matching. For cell manufacturers, etching equipment is not merely auxiliary process equipment, but a critical factor directly affecting conversion efficiency, yield, manufacturing cost, and line continuity.

The global supply landscape is characterized by the coexistence of multiple technology routes. German companies have strong capabilities in high-efficiency crystalline-silicon wet chemical processing and dry-in/dry-out platforms. U.S. companies have differentiated strengths in customized wet benches, conveyorized etching, and plasma processing equipment. Japanese companies retain technical foundations in vacuum, texturing, and PSG treatment. Chinese companies are rapidly iterating through large-scale photovoltaic manufacturing and N-type cell capacity expansion, while Korean and Taiwanese companies participate through wet benches, vacuum plasma equipment, and production-line support. As cell processes continue to evolve, suppliers must provide not only equipment hardware, but also process support, automation interfaces, chemical management, spare-parts services, and on-site commissioning. Future competition will not revolve only around the price of a single tool, but increasingly around investment intensity per GW, equipment uptime, line yield, chemical usage, and proven mass-production records at customer sites.

Downstream demand will continue to be driven by high-efficiency cell expansion, wafer thinning, perovskite industrialization, and regional manufacturing localization. TOPCon production lines require more mature capabilities in texturing, BSG removal, PSG removal, and wraparound removal. HJT lines place greater emphasis on low-damage cleaning and surface-condition control. BC cells require more complex single-side and localized processing, while perovskite and thin-film cells are increasing demand for laser scribing and patterning equipment. At the same time, photovoltaic manufacturing is spreading to Southeast Asia, India, the United States, and parts of Europe, creating new requirements for cross-regional delivery, service networks, and on-site process adaptation. Overall, the etching equipment industry for solar cells has a clear technology-upgrade logic and strong replacement demand, with long-term potential to evolve from traditional wet-process equipment into high-throughput, low-consumption, low-damage, and intelligent surface-processing platforms.

This report studies the global Etching Equipment for Solar Cell production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Etching Equipment for Solar Cell 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 Etching Equipment for Solar Cell that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Etching Equipment for Solar Cell total production and demand, 2021-2032, (Units)

Global Etching Equipment for Solar Cell total production value, 2021-2032, (USD Million)

Global Etching Equipment for Solar Cell production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Etching Equipment for Solar Cell consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Etching Equipment for Solar Cell domestic production, consumption, key domestic manufacturers and share

Global Etching Equipment for Solar Cell production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Etching Equipment for Solar Cell production by Process Method, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Etching Equipment for Solar Cell production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Etching Equipment for Solar Cell 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 RENA Technologies GmbH, SINGULUS TECHNOLOGIES AG, Chemcut Corporation, Modutek Corporation, Wafer Process Systems Inc., Plasma Etch, Inc., SENTECH Instruments GmbH, ULVAC, Inc., Y.A.C. Holdings Co., Ltd., Syskey Technology 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 Etching Equipment for Solar Cell 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 Process 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 Etching Equipment for Solar Cell Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Etching Equipment for Solar Cell Market, Segmentation by Process Method:

Wet Etching

Dry Etching

Laser Etching

Global Etching Equipment for Solar Cell Market, Segmentation by Equipment

Configuration:

Batch Tank

Inline Chain

Other

Global Etching Equipment for Solar Cell Market, Segmentation by Automation Level:

Manual Equipment

Semi-Automatic Equipment

Fully Automatic Equipment

Global Etching Equipment for Solar Cell Market, Segmentation by Application:

Damage Removal

Optical Texturing

Phosphosilicate Glass Removal

Borosilicate Glass Removal

Other

Companies Profiled:

RENA Technologies GmbH

SINGULUS TECHNOLOGIES AG

Chemcut Corporation

Modutek Corporation

Wafer Process Systems Inc.

Plasma Etch, Inc.

SENTECH Instruments GmbH

ULVAC, Inc.

Y.A.C. Holdings Co., Ltd.

Syskey Technology Co., Ltd.

Suzhou Kzone Equipment Technology Co., Ltd.

Shenzhen S.C New Energy Technology Corporation

Hubei Jingshan Light Industry Machinery Co., Ltd.

Suzhou Delphi Laser Co., Ltd.

LPKF Laser & Electronics SE

Nines Photovoltaics Ltd.

Ultech Co., Ltd.

Key Questions Answered:

1. How big is the global Etching Equipment for Solar Cell market?
2. What is the demand of the global Etching Equipment for Solar Cell market?
3. What is the year over year growth of the global Etching Equipment for Solar Cell market?
4. What is the production and production value of the global Etching Equipment for Solar Cell market?
5. Who are the key producers in the global Etching Equipment for Solar Cell market?
6. What are the growth factors driving the market demand?

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