

Global Precision Dicing Blades Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G60D127580DAEN.html>

Date: August 2026

Pages: 125

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

ID: G60D127580DAEN

Abstracts

According to our (Global Info Research) latest study, the global Precision Dicing Blades market size was valued at US\$ 550 million in 2025 and is forecast to a readjusted size of US\$ 804 million by 2032 with a CAGR of 5.5% during review period.

Precision dicing blades are ultra-thin abrasive tools mounted on the spindles of high-precision dicing saws to perform full cutting, partial cutting, grooving and singulation of wafers and other hard and brittle materials. They generally consist of diamond abrasive grains, a bonding system and a supporting structure. Major configurations include hub blades and hubless blades, while the principal bonding systems comprise electroformed, resin and metal bonds. Key performance parameters include blade thickness, grit size and concentration, blade exposure, rigidity, service life, kerf width, chipping control and cutting stability.

Precision dicing blades are primarily used for silicon wafers, silicon carbide, gallium arsenide, gallium phosphide, lithium tantalate and other semiconductor or compound semiconductor wafers, as well as integrated circuit packages, light-emitting diode substrates, ceramics, glass, quartz, ferrite and electronic components. They are high-frequency replacement process consumables used with dicing equipment. The product scope covers newly manufactured blades used in precision dicing and package singulation, while excluding dicing saws, grinding wheels, dry polishing wheels, dressing boards, laser and plasma dicing equipment, and related processing services.

In 2025, global production of precision dicing blades reached approximately 6.8 million to 7.4 million pieces. On an ex-factory basis for products used in semiconductor wafers, packaging substrates, electronic ceramics and precision electronic components, the

weighted average FOB price was approximately USD 72 to USD 80 per piece, while ultra-thin blades, high-rigidity metal-bond blades and customized hub blades for specialized materials were generally priced above this range.

Market Opportunities and Core Growth Drivers

The global precision dicing blade market is shifting from conventional wafer-cutting consumables toward application-specific process tools offering higher yield, tighter consistency and improved material compatibility. The expansion of artificial intelligence servers, advanced logic devices, high-bandwidth memory and Chiplet architectures is accelerating wafer thinning, die miniaturization and multi-die integration, increasing demand for blades capable of delivering narrower kerfs, reduced chipping and improved cutting straightness. Recovering global silicon wafer shipments and continued growth in 300 mm wafer demand provide a solid volume base, while the increasing use of silicon carbide, gallium arsenide, lithium tantalate, ceramics and glass is raising the value of metal-bond, electroformed and customized ultra-thin blades. Market growth is therefore expected to be driven increasingly by product mix and processing value rather than by standard blade volumes alone.

Industry Chain and Commercial Model

Upstream inputs primarily include synthetic diamond micron powders, nickel and electroforming chemicals, resin and metal bonding materials, steel cores and aluminum hubs. Midstream production involves abrasive grading, bond formulation, electroforming or sintering, ultra-thin forming, edge conditioning, dynamic balancing and cutting-performance inspection. Downstream customers include wafer manufacturers, integrated device manufacturers, outsourced semiconductor assembly and test companies, power semiconductor producers, and manufacturers of light-emitting diodes, microelectromechanical systems and electronic components. Because blades must be qualified according to substrate material, workpiece thickness, cutting speed, chipping limits and spindle compatibility, approved products generally generate recurring orders after entering customer-qualified supplier systems. The commercial model consequently combines equipment-installed-base support, process qualification and repeat consumable sales.

Downstream Demand Trends

Silicon wafer dicing and conventional semiconductor package singulation will remain the largest demand base, while advanced packaging, ultra-thin wafers, silicon carbide

power devices and compound semiconductors are expected to deliver faster value growth. Laser and plasma dicing will replace part of the mechanical blade process in low-k materials, extremely thin dies and complex wafer-level packages. Nevertheless, blade dicing retains significant advantages in processing cost, manufacturing flexibility, installed equipment base and compatibility with multiple materials. Future competition will focus on thinner cutting edges, higher rigidity, longer blade life, compatibility with automatic blade-changing systems and customized process solutions for specific substrates.

This report is a detailed and comprehensive analysis for global Precision Dicing Blades market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type 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 Precision Dicing Blades market size and forecasts, in consumption value (\$ Million), sales quantity (Million Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Precision Dicing Blades market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Precision Dicing Blades market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Pcs), and average selling prices (US\$/Pcs), 2021-2032

Global Precision Dicing Blades market shares of main players, shipments in revenue (\$ Million), sales quantity (Million Pcs), and ASP (US\$/Pcs), 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 Precision Dicing Blades

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 Precision Dicing Blades 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 DISCO Corporation, Asahi Diamond Industrial Co., Ltd., Advanced Dicing Technologies Ltd., Thermocarbon Inc., UKAM Industrial Superhard Tools, Kulicke and Soffa Industries, Inc., EHWA Diamond Industrial Co., Ltd., SHINHAN DIAMOND IND. CO., LTD., KODIS CO., LTD., KINIK Company, etc.

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

Market Segmentation

Precision Dicing Blades market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, 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 Type

Aluminum Hub Blades

Annular Hubless Blades

Steel Core Blades

Market segment by End Use Industry

Integrated Circuits and Memory

Power Semiconductor Devices

Optoelectronics and MEMS

Electronic Components and Others

Market segment by Bond Type

Electroformed Nickel Bond

Resin Bond

Sintered Metal Bond

Others

Market segment by Blade Thickness

Up to 30 ?m

More than 30 ?m and up to 60 ?m

More than 60 ?m

Market segment by Application

Semiconductor Wafers

Semiconductor Packages and Substrates

Electronic Components and Optical Parts

Others

Major players covered

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Advanced Dicing Technologies Ltd.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

Kulicke and Soffa Industries, Inc.

EHWA Diamond Industrial Co., Ltd.

SHINHAN DIAMOND IND. CO., LTD.

KODIS CO., LTD.

KINIK Company

NDS (Taiwan) Co., Ltd.

Sinomach Diamond (Henan) Co., Ltd.

WINTIME Semiconductor Technology Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

Suzhou Sail Science & Technology Co., 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 Precision Dicing Blades product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Precision Dicing Blades, with price, sales quantity, revenue, and global market share of Precision Dicing Blades from 2021 to 2026.

Chapter 3, the Precision Dicing Blades competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Precision Dicing Blades 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 Type and by Application, with sales market share and growth rate by Type, 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 Precision Dicing Blades market forecast, by regions, by Type, 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 Precision Dicing Blades.

Chapter 14 and 15, to describe Precision Dicing Blades sales channel, distributors, customers, research findings and conclusion.

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