

# Global Precision Lapping and Polishing Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Precision Lapping and Polishing Equipment market size is expected to reach \$ 1460 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

Precision Lapping and Polishing Equipment refers to advanced processing tools used to achieve ultra-high flatness, high dimensional accuracy, and low surface roughness on hard and brittle materials as well as precision components. This equipment mainly includes single-side lapping machines, double-side lapping machines, and polishing machines, which remove material at the micron or even sub-micron level using free abrasives or fixed abrasives. Such equipment is widely used in the processing of silicon wafers, silicon carbide (SiC), sapphire, optical glass, quartz crystals, ceramic substrates, and precision metal parts.

The upstream segment of its industrial chain includes abrasives such as diamond and aluminum oxide, as well as polishing slurries, polishing pads, and precision mechanical and motion control components. The midstream involves equipment design, system integration, and process optimization for different materials. Downstream demand comes from semiconductor material manufacturers, optoelectronic device companies, optical component manufacturers, power electronics, advanced ceramics, and precision manufacturing industries. This market is characterized by high technical barriers, strong customization requirements, and long equipment validation cycles.

In the Chinese precision lapping and polishing equipment market, the market size reached 180 million USD in 2024 and is expected to reach 198 million USD in 2025. Shipments totaled 1,915 units in 2024 and are projected to reach 2,159 units in 2025.

On the global market, shipments reached 6,950 units in 2024, with a market size of 885 million USD. In 2025, the average selling price of this equipment is approximately 124,100 USD per unit, with global shipments reaching around 7,613 units. Benefiting from high-precision processing requirements, cross-industry demand support, and continuous technological upgrades, the industry maintains gross profit margins between 28% and 45%.

The precision lapping and polishing equipment market is experiencing steady growth driven by the relentless demand for higher surface quality and tighter geometric tolerances across advanced manufacturing sectors. The semiconductor industry remains the largest consumer, as wafer manufacturers require sub-micron flatness and defect-free surfaces for silicon, silicon carbide, and gallium arsenide substrates. Traditional processes that rely on manual operation are being rapidly replaced by fully automated systems with recipe management, multi-stage processing capabilities, and real-time data collection for enhanced repeatability and process control. Another key trend is the increasing adoption of chemical mechanical planarization platforms for semiconductor delayering and microelectronic device fabrication. As device geometries continue to shrink, the requirement for global and local planarization has become critical, driving investment in advanced CMP systems with integrated endpoint detection and slurry distribution optimization. The shift toward wide-bandgap semiconductors—particularly silicon carbide and gallium nitride—has created new demand for lapping systems capable of processing these hard, brittle materials without inducing sub-surface damage. The market is also witnessing significant growth in the optics and optoelectronics segment. The proliferation of high-resolution cameras, LiDAR systems for autonomous vehicles, and advanced microscopy has increased demand for precision optical components requiring exceptional surface finish and figure accuracy. Automated single-sided and double-sided polishing systems with programmable pressure control and plate speed optimization have become essential for achieving the required surface quality at production volumes.

This report studies the global Precision Lapping and Polishing Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Precision Lapping and Polishing Equipment total production and demand, 2021-2032, (Units)

Global Precision Lapping and Polishing Equipment total production value, 2021-2032, (USD Million)

Global Precision Lapping and Polishing Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Precision Lapping and Polishing Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Precision Lapping and Polishing Equipment domestic production, consumption, key domestic manufacturers and share

Global Precision Lapping and Polishing Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Precision Lapping and Polishing Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Precision Lapping and Polishing Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Precision Lapping and Polishing 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 Tokyo Seimitsu Co., Ltd., Okamoto Corporation, SpeedFam Corporation, Lapmaster Wolters GmbH, DISCO Corporation, Hunan Yujing Machinery Co., Ltd., Zhejiang Jingsheng Mechanical & Electrical Co., Ltd., Supfina Grieshaber GmbH & Co. KG, Yuhuan CNC Machine Tool Co., Ltd., Engis Corporation, 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 Precision Lapping and Polishing Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 Precision Lapping and Polishing Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Precision Lapping and Polishing Equipment Market, Segmentation by Type:

Single-sided Machine

Double-sided Machine

#### Global Precision Lapping and Polishing Equipment Market, Segmentation by Automation Level:

Manual Equipment

Semi-Automatic Equipment

Fully Automatic Equipment

## Global Precision Lapping and Polishing Equipment Market, Segmentation by Equipment Functions:

Lapping Machine

Polishing Machine

Lapping & Polishing Combo

## Global Precision Lapping and Polishing Equipment Market, Segmentation by Application:

Semiconductor Materials

Precision Optics

Other

## Companies Profiled:

Tokyo Seimitsu Co., Ltd.

Okamoto Corporation

SpeedFam Corporation

Lapmaster Wolters GmbH

DISCO Corporation

Hunan Yujing Machinery Co., Ltd.

Zhejiang Jingsheng Mechanical & Electrical Co., Ltd.

Supfina Grieshaber GmbH & Co. KG

Yuhuan CNC Machine Tool Co., Ltd.

Engis Corporation

Hamai Co., Ltd.

St?hli Lapping Technology

CETC Beijing Electronic Equipment Co., Ltd.

Kemet International Ltd.

G&N Genauigkeitsmaschinen N?rnberg GmbH

LAM PLAN S.A.

#### Key Questions Answered:

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

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