

Global Process Equipment for TSV Manufacturing Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Process Equipment for TSV Manufacturing market size was valued at US\$ 1907 million in 2025 and is forecast to a readjusted size of US\$ 3515 million by 2032 with a CAGR of 7.4% during review period.

TSV process key equipment refers to semiconductor process equipment used to fabricate Through-Silicon Via structures. It mainly serves applications such as HBM/3D DRAM, 2.5D silicon interposers, 3D IC heterogeneous integration, CMOS image sensors, MEMS/sensors, RF devices, and other advanced packaging scenarios. TSV technology forms vertical conductive vias inside silicon wafers or dies, enabling high-density vertical interconnection within chips, between stacked dies, or between chips and silicon interposers.

In terms of process flow, TSV fabrication typically involves deep silicon etching, dielectric liner deposition, barrier/seed layer deposition, copper electroplating, CMP planarization, TSV reveal, temporary bonding/debonding, and inspection/metrology. Accordingly, TSV process key equipment mainly includes deep silicon etching equipment, thin film deposition equipment, CMP equipment, electroplating equipment, bonding/debonding equipment, and TSV inspection and metrology equipment.

Among these, deep silicon etching equipment is used to form high-aspect-ratio silicon vias; deposition equipment is used to form dielectric liners, diffusion barrier layers, and seed layers; electroplating equipment is used for TSV metal filling, especially copper filling; CMP equipment is used for copper planarization and TSV reveal; bonding/debonding equipment supports thin-wafer handling during backside processing;

and inspection and metrology equipment is used to monitor via profile, via depth, filling defects, voids, TTV, wafer warpage, overlay, and surface defects. This equipment category has both front-end wafer processing and advanced packaging attributes, making it a critical infrastructure for high-bandwidth, high-density, and miniaturized semiconductor integration.

The TSV process key equipment market is evolving from a relatively niche and application-specific equipment segment into a strategic equipment category driven by HBM, AI accelerators, and 2.5D/3D advanced packaging. Historically, TSV was mainly used in CMOS image sensors, MEMS, RF devices, and selected sensor packages. Demand in these applications was relatively stable and often linked to customized process lines, mature wafer-level packaging capacity, and device-specific requirements. As a result, TSV equipment demand was fragmented, with limited scale compared with mainstream front-end semiconductor equipment.

This market structure is changing rapidly. The growth of AI servers, high-end GPUs, HBM, and advanced ASICs has made TSV a core enabling technology for high-bandwidth memory stacks and silicon interposer-based packaging. In HBM, TSV enables vertical interconnection between stacked DRAM dies. In 2.5D packaging, TSVs in silicon interposers provide dense vertical routing between upper-side chips and the package substrate. Therefore, TSV equipment procurement is shifting from isolated process-tool purchases toward full high-yield process-chain deployment.

From an equipment structure perspective, the market is centered on six core categories: deep silicon etching, thin film deposition, electroplating, CMP, temporary bonding/debonding, and TSV inspection and metrology. Deep silicon etching defines via depth, via diameter, aspect ratio, sidewall profile, and wafer-level uniformity. Deposition equipment determines dielectric isolation, copper diffusion barrier performance, and seed-layer continuity. Electroplating equipment directly affects void-free copper filling, filling time, overburden control, and electrical reliability. CMP and TSV reveal equipment determine surface planarity, residual copper control, backside copper exposure, and subsequent bonding quality. Temporary bonding and debonding equipment is essential for thin-wafer support, backside processing, warpage control, and wafer breakage reduction. Inspection and metrology equipment is increasingly important because TSV-related defects, such as voids, incomplete fill, via-depth deviation, warpage, and TTV variation, must be controlled in-process rather than only at final test.

The technical threshold of TSV equipment is rising as HBM stacks move toward higher layers, thinner wafers, tighter warpage control, and higher interconnect density. The key

challenge is no longer simply whether a tool can etch vias or fill copper, but whether it can support stable, high-throughput, low-defect, and low-damage production under advanced packaging mass-production conditions. This creates stronger demand for integrated process capability, tool-to-tool matching, materials compatibility, and inline defect control.

In terms of competitive landscape, overseas equipment suppliers still maintain clear advantages in high-end mass-production validation, process databases, and customer qualification, especially in temporary bonding/debonding, high-aspect-ratio deposition, advanced TSV metrology, and high-reliability process integration. Companies such as Lam Research, KLA/SPTS, Applied Materials, EVG, SUSS MicroTec, TEL, Onto Innovation, Camtek, Nordson, EBARA, and DISCO remain important global suppliers across different process steps. Chinese equipment vendors have made more visible progress in deep silicon etching, electroplating, CMP, and selected deposition tools, with companies such as NAURA, AMEC, ACM Research/ACM Shanghai, and Hwatsing becoming increasingly relevant. However, HBM-grade qualification, advanced memory customer adoption, and full-flow process integration remain key barriers.

Overall, TSV process key equipment should not be treated as a generic subcategory of advanced packaging equipment. It is a high-barrier process equipment segment positioned at the intersection of front-end wafer processing and advanced packaging. Future market growth will be mainly driven by HBM capacity expansion, silicon interposer demand for AI accelerators, 3D IC heterogeneous integration, and the build-out of domestic advanced packaging supply chains. As AI computing architectures continue to increase bandwidth and integration density requirements, TSV-related equipment value and technical complexity are likely to continue rising.

This report is a detailed and comprehensive analysis for global Process Equipment for TSV Manufacturing 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 Process Equipment for TSV Manufacturing market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K

US\$/Unit), 2021-2032

Global Process Equipment for TSV Manufacturing market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Process Equipment for TSV Manufacturing market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Process Equipment for TSV Manufacturing market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 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 Process Equipment for TSV Manufacturing

- 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 Process Equipment for TSV Manufacturing 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 Applied Materials, Lam Research, KLA, Plasma-Therm, SPT Corporation, Samco, NAURA, AMEC Inc, Oxford Instruments, ACM Research, etc.

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

Market Segmentation

Process Equipment for TSV Manufacturing 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

Deep Etching Equipment

Thin Film Deposition Equipment

CMP Equipment

Electroplating Equipment / ECD Equipment

Bonding / Debonding Equipment

TSV Inspection and Metrology Equipment

Market segment by Wafer Size

200mm TSV Equipment

300mm TSV Equipment

Market segment by Application

HBM / 3D DRAM

2.5D Silicon Interposer / AI Advanced Packaging

3D IC / Heterogeneous Integration

CMOS Image Sensors

MEMS / Sensors

Others

Major players covered

Applied Materials

Lam Research

KLA

Plasma-Therm

SPT Corporation

Samco

NAURA

AMEC Inc

Oxford Instruments

ACM Research

ASMPT

Beneq

ClassOne Technology

EBARA

Hwatsing Technology

Onto Innovation

Camtek

Nordson

EVG

SUSS

TEL

GigaLane 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 Process Equipment for TSV Manufacturing product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Process Equipment for TSV Manufacturing, with price, sales quantity, revenue, and global market share of Process Equipment for TSV Manufacturing from 2021 to 2026.

Chapter 3, the Process Equipment for TSV Manufacturing competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Process Equipment for TSV Manufacturing 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 Process Equipment for TSV Manufacturing 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 Process Equipment for TSV Manufacturing.

Chapter 14 and 15, to describe Process Equipment for TSV Manufacturing sales channel, distributors, customers, research findings and conclusion.

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