

Global Process Equipment for TSV Manufacturing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Process Equipment for TSV Manufacturing market size is expected to reach \$ 3515 million by 2032, rising at a market growth of 7.4% CAGR during the forecast period (2026-2032).

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 studies the global Process Equipment for TSV Manufacturing production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Process Equipment for TSV Manufacturing total production and demand, 2021-2032, (Units)

Global Process Equipment for TSV Manufacturing total production value, 2021-2032,

(USD Million)

Global Process Equipment for TSV Manufacturing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Process Equipment for TSV Manufacturing consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Process Equipment for TSV Manufacturing domestic production, consumption, key domestic manufacturers and share

Global Process Equipment for TSV Manufacturing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Process Equipment for TSV Manufacturing production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Process Equipment for TSV Manufacturing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Process Equipment for TSV Manufacturing 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Process Equipment for TSV Manufacturing 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 Process Equipment for TSV Manufacturing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Process Equipment for TSV Manufacturing Market, Segmentation by Type:

Deep Etching Equipment

Thin Film Deposition Equipment

CMP Equipment

Electroplating Equipment / ECD Equipment

Bonding / Debonding Equipment

TSV Inspection and Metrology Equipment

Global Process Equipment for TSV Manufacturing Market, Segmentation by Wafer Size:

200mm TSV Equipment

300mm TSV Equipment

Global Process Equipment for TSV Manufacturing Market, Segmentation by Application:

HBM / 3D DRAM

2.5D Silicon Interposer / AI Advanced Packaging

3D IC / Heterogeneous Integration

CMOS Image Sensors

MEMS / Sensors

Others

Companies Profiled:

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

Key Questions Answered:

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

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