

Global Selective Etch Equipment 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 Selective Etch Equipment market size was valued at US\$ 2933 million in 2025 and is forecast to a readjusted size of US\$ 6047 million by 2032 with a CAGR of 10.5% during review period.

Selective etch equipment refers to semiconductor process equipment designed to remove target materials with high selectivity, low damage, and tightly controlled profile performance during wafer fabrication, advanced packaging, MEMS, compound semiconductor, and optoelectronic device manufacturing. This study focuses on equipment platforms capable of selective material removal in multi-material stacks, three-dimensional device structures, nanoscale critical dimensions, high-aspect-ratio features, and sensitive interfaces. Major product forms include selective dry etch platforms, gas chemical etch systems, remote plasma etch systems, isotropic selective etch tools, quasi-atomic-layer etch systems, and single-wafer or batch wet etch systems used for selective removal of UBM, TSV, metals, dielectrics, and compound semiconductor materials. Key performance parameters include material-to-material selectivity, within-wafer and wafer-to-wafer uniformity, etch rate, surface roughness, CD bias, plasma-induced damage, particle control, chamber stability, temperature control, endpoint control, and high-volume manufacturing repeatability. The value of this equipment category lies in enabling advanced logic GAA structures, next-generation memory, 3D devices, advanced packaging, and specialty devices where conventional etch and clean tools are no longer sufficient.

Based on our research, selective etch equipment should be understood as a material-selectivity control platform rather than a simple extension of conventional etch tools.

Conventional dry etch systems are primarily evaluated by pattern transfer, anisotropic profile control, etch rate, and high-aspect-ratio capability. Selective etch tools, by contrast, are evaluated by their ability to remove only the intended material while preserving neighboring films, interfaces, stop layers, and sensitive device structures. This distinction becomes critical as device architectures move from planar and FinFET structures toward gate-all-around nanosheets, 3D NAND, high-density DRAM, and advanced heterogeneous integration.

Demand growth is increasingly driven by three structural forces: GAA logic, three-dimensional memory, and advanced packaging. GAA logic requires highly selective removal of sacrificial layers and precise control of nanosheet or nanowire structures. 3D NAND and DRAM require more demanding etch and clean steps as vertical structures become deeper, thinner, and more material-diverse. Advanced packaging, especially HBM and chiplet integration, drives wet selective etch demand for UBM, TSV, metal, dielectric, and residue-related processes. Policy and supply-chain dynamics also matter. Localization programs in China, capacity investment in Japan and Korea, and strategic equipment controls in the United States and allied regions are changing the regional structure of tool qualification, but advanced selective dry etch remains one of the most difficult segments to localize quickly.

From a technology-roadmap perspective, the industry is moving from standalone etch chambers toward integrated process platforms combining material science, plasma chemistry, radical generation, temperature control, endpoint control, and software-enabled process repeatability. The competitive edge lies not only in chamber hardware, but also in process libraries, co-development with device makers, installed-base learning, uptime, consumables lifetime, and integration with deposition, clean, and metrology steps. This makes the market attractive but difficult for new entrants: specialty and wet-process niches remain open, while leading-edge dry selective etch is likely to remain dominated by a small number of global suppliers over the medium term.

This report is a detailed and comprehensive analysis for global Selective Etch Equipment 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 Selective Etch Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

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

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

Global Selective Etch Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (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 Selective Etch Equipment

- 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 Selective Etch Equipment 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, Inc., Lam Research Corporation, Tokyo Electron Limited, KLA Corporation, Hitachi High-Tech Corporation, NAURA Technology Group Co., Ltd., Advanced Micro-Fabrication Equipment Inc. China, Beijing E-Town Semiconductor Technology Co., Ltd., SEMES Co., Ltd., ACM Research, Inc., etc.

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

Market Segmentation

Selective Etch Equipment 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

Dry Selective Etch Equipment

Wet Selective Etch Equipment

Other Selective Etch Equipment

Market segment by Wafer Size

300 mm Equipment

200 mm Equipment

150 mm and Below Equipment

Other Substrate Size Equipment

Market segment by Etch Profile

Isotropic Selective Etch

Anisotropic Selective Etch

Other Etch Profiles

Market segment by Application

Nanosheet / GAA Release Etch

Dielectric Selective Removal

TSV / UBM / RDL Etch

Other Process Applications

Major players covered

Applied Materials, Inc.

Lam Research Corporation

Tokyo Electron Limited

KLA Corporation

Hitachi High-Tech Corporation

NAURA Technology Group Co., Ltd.

Advanced Micro-Fabrication Equipment Inc. China

Beijing E-Town Semiconductor Technology Co., Ltd.

SEMES Co., Ltd.

ACM Research, Inc.

SCREEN Semiconductor Solutions Co., Ltd.

Oxford Instruments plc

Veeco Instruments Inc.

Plasma-Therm LLC

ULVAC, Inc.

Samco Inc.

Canon ANELVA Corporation

GigaLane Co., Ltd.

ClassOne Technology, Inc.

RENA Technologies GmbH

NexGen Wafer Systems Pte. Ltd.

SENTECH Instruments GmbH

Trion Technology, Inc.

SPT Corporation

Siconnex customized solutions GmbH

AP&S International GmbH

JST Manufacturing Inc.

Modutek Corporation

Akrion Technologies LLC

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 Selective Etch Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Selective Etch Equipment, with price, sales quantity, revenue, and global market share of Selective Etch Equipment from 2021 to 2026.

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

Chapter 4, the Selective Etch Equipment 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 Selective Etch Equipment 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 Selective Etch Equipment.

Chapter 14 and 15, to describe Selective Etch Equipment sales channel, distributors, customers, research findings and conclusion.

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