

Global Semiconductor Dicing Blades Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Dicing Blades market size is expected to reach \$ 806 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Semiconductor dicing blades are ultra-thin circular precision tools that use diamond abrasives as the primary cutting medium and are mounted on high-speed precision dicing saw spindles to separate semiconductor wafers, wafer-level packages, and molded package strips into individual dies or devices. The blades are principally manufactured with electroformed nickel, resin, or sintered metal bonds and are supplied in hub and hubless configurations. The core commercial cutting-edge thickness generally ranges from approximately 15 to 750 micrometers. Wafer dicing products are primarily concentrated between approximately 15 and 120 micrometers, while semiconductor package singulation blades generally range from approximately 50 to 750 micrometers. Selected narrow-kerf products can achieve cutting-edge thicknesses of approximately 9 micrometers.

Semiconductor dicing blades are used to process silicon, gallium arsenide, indium phosphide, silicon carbide, gallium nitride, and other semiconductor wafers, as well as wafer-level packages, flip-chip packages, ball grid arrays, land grid arrays, quad-flat no-lead packages, microelectromechanical systems, sensors, and light-emitting diode packages. The products must balance kerf width, chipping control, blade life, self-sharpening performance, cutting speed, and batch consistency and are therefore critical consumable precision tools in semiconductor back-end manufacturing. The category excludes ingot slicing blades, wafer thinning wheels, laser and plasma dicing equipment, and general-purpose industrial blades used to process ordinary glass, ceramics, magnetic materials, and printed circuit boards.

In 2025, global semiconductor dicing blade production reached approximately 6.9 million to 7.3 million pieces, while the weighted ex-works price of mainstream products was approximately USD 72 to USD 78 per piece. Volume-produced electroformed nickel wafer blades and standard package singulation blades were mainly concentrated within this range, while ultra-thin hub blades, silicon carbide and compound semiconductor blades, low-chipping package blades, and low-volume customized products generally recorded ex-works prices above USD 100 per piece.

Opportunities and Core Market Drivers

The continued expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, automotive electronics, power semiconductors, radio-frequency communications, and intelligent sensors is supporting stable consumables demand for semiconductor dicing blades. The transition toward thinner wafers, narrower dicing streets, and smaller dies requires wafer blades with reduced cutting-edge thickness, more uniform abrasive distribution, and greater process stability. At the same time, wafer-level packaging, flip-chip integration, three-dimensional integration, and multi-die packaging are creating more complex combinations of metal layers, dielectric materials, and molding compounds, driving demand for low-chipping, high-rigidity, and long-life package singulation blades. The commercialization of hard and brittle materials, including silicon carbide, gallium nitride, and gallium arsenide, is also expanding opportunities for specialized bond formulations and high-performance diamond tools.

Industry Chain and Downstream Demand Trends

The upstream semiconductor dicing blade supply chain includes synthetic diamond powders, high-purity nickel and nickel salts, resins, metal-bond powders, steel cores, and aluminum hubs. Midstream operations include abrasive grading, electroforming, molding and curing, powder sintering, precision grinding, dynamic balancing, and application qualification. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, wafer manufacturers, and producers of light-emitting diodes and microelectromechanical systems. Because blade performance directly affects chipping, cracking, delamination, die strength, and final production yield, new products normally require extensive material matching and volume-production qualification.

Future demand will increasingly focus on the integrated matching of blades with dicing

equipment, spindle systems, cooling fluids, and specific material structures. Competition will consequently shift from initial purchase price toward cost per cutting length, equipment utilization, blade replacement frequency, and total manufacturing yield. Laser and plasma dicing technologies are expected to expand in selected advanced applications, but mechanical dicing blades will retain important cost and throughput advantages in mature silicon devices, discrete semiconductors, power devices, and high-volume package singulation.

This report studies the global Semiconductor Dicing Blades production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Dicing Blades 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 Semiconductor Dicing Blades that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Dicing Blades total production and demand, 2021-2032, (Million Pcs)

Global Semiconductor Dicing Blades total production value, 2021-2032, (USD Million)

Global Semiconductor Dicing Blades production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs), (based on production site)

Global Semiconductor Dicing Blades consumption by region & country, CAGR, 2021-2032 & (Million Pcs)

U.S. VS China: Semiconductor Dicing Blades domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Dicing Blades production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Pcs)

Global Semiconductor Dicing Blades production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)

Global Semiconductor Dicing Blades production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Pcs)

This report profiles key players in the global Semiconductor Dicing Blades 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 DISCO Corporation, Asahi Diamond Industrial

Co., Ltd., Tokyo Seimitsu Co., Ltd., Kulicke and Soffa Industries, Inc., Keteca Singapore Pte. Ltd., Saint-Gobain S.A., Thermocarbon Inc., UKAM Industrial Superhard Tools, YMB Co., Ltd., EHWA DIAMOND INDUSTRIAL CO., LTD., 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 Semiconductor Dicing Blades market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Pcs) and average price (US\$/Pcs) 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 Semiconductor Dicing Blades Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Dicing Blades Market, Segmentation by Type:

Wafer Dicing Blades

Package Singulation Blades

Global Semiconductor Dicing Blades Market, Segmentation by Blade Structure:

Hub Blades

Hubless Blades

Global Semiconductor Dicing Blades Market, Segmentation by Workpiece Material:

Silicon and Silicon Based Wafers

Compound Semiconductor Wafers

Molded Package Composites

Others

Global Semiconductor Dicing Blades Market, Segmentation by Bond Type:

Electroformed Nickel Bond

Resin Bond

Sintered Metal Bond

Others

Global Semiconductor Dicing Blades Market, Segmentation by Application:

Logic and Memory Devices

Power Semiconductor Devices

Optoelectronic and Radio Frequency Devices

MEMS and Sensor Devices

Companies Profiled:

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Tokyo Seimitsu Co., Ltd.

Kulicke and Soffa Industries, Inc.

Keteca Singapore Pte. Ltd.

Saint-Gobain S.A.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

Shinhan Diamond Industrial Co., Ltd.

YDI Co., Ltd.

KINIK COMPANY

NDS (TAIWAN) CO., LTD.

GL Tech Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

WINTIME Semiconductor Technology Co., Ltd.

Zhengzhou Research Institute for Abrasives and Grinding Co., Ltd.

Nanjing Sanchao Advanced Materials Co., Ltd.

Zhejiang Xiste Technology Co., Ltd.

Dongguan HEF Mechanical Electrical Equipment Co., Ltd.

Key Questions Answered:

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

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Figure 77. Semiconductor Dicing Blades Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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