

Global Semiconductor Grinding Wheels Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Grinding Wheels market size is expected to reach \$ 872 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

Semiconductor Grinding Wheels are precision grinding consumables used in the in-feed grinding process of semiconductor wafers, including TSV package wafers (Cu/compound), SiC wafers, sapphire wafers, silicon wafers, and reclaimed wafers. The in-feed grinding process generally consists of rough grinding and fine grinding stages. These grinding wheels are typically made of diamond abrasives and customized vitrified bond materials with a unique porous microstructure. In rough grinding, the commonly used grit size range is #325?#1000, while fine grinding generally uses #2000?#8000. Semiconductor Grinding Wheels are characterized by stable high removal rates, long service life, and low grinding resistance, which make them important consumables in wafer thinning and surface preparation.

In 2025, global Semiconductor Grinding Wheels production reached approximately 251 k units, with an average global market price of around US\$ 2002 per unit.

The upstream raw materials of Semiconductor Grinding Wheels mainly include abrasive materials and bond materials. Representative suppliers of abrasive materials include Element Six and Hyperion Materials & Technologies. Representative suppliers of bond materials include Sumitomo Bakelite and Hexion.

The downstream applications of Semiconductor Grinding Wheels are mainly concentrated in semiconductor wafer manufacturing and wafer back grinding processes, especially for 12 Inch Wafer, 8 Inch Wafer, and other wafer types. Major downstream

customers include Wolfspeed, Coherent, Semiconductor Manufacturing International Corporation (SMIC), and SK Siltron.

The gross margin of Semiconductor Grinding Wheels is generally in the range of 35%-65%. This range is influenced by factors such as grit specification, bond formulation, customization level, wafer material type, and customer qualification requirements.

In the Semiconductor Grinding Wheels market, product type differentiation is closely aligned with the process requirements of semiconductor wafer thinning and surface preparation. The market is mainly divided into Coarse Grinding (#325-#1000) and Fine Grinding (#2000-#8000). Coarse Grinding products are primarily used in the initial stage of wafer back grinding, where rapid material removal is required to improve processing efficiency and prepare wafers for subsequent finishing steps. Fine Grinding products are used in the later stage of the process, where higher requirements are placed on surface quality, thickness uniformity, and overall machining precision. Driven by the increasing demand for thinner wafers, better surface integrity, and tighter tolerance control in advanced semiconductor manufacturing, Fine Grinding (#2000-#8000) has become the dominant product segment, accounting for more than 61% of the global market in 2025. This reflects the market's growing emphasis on precision finishing performance and the rising technical requirements associated with advanced wafer processing.

From the application perspective, the Semiconductor Grinding Wheels market serves 12 Inch Wafer, 8 Inch Wafer, and Others. Among these segments, 12 Inch Wafer represents the dominant application market, accounting for about 83% of the global market in 2025. This reflects the leading position of 12-inch wafers in mainstream semiconductor manufacturing, where larger wafer sizes are widely adopted to improve production efficiency and reduce unit cost in high-volume fabrication.

In terms of consumption, Asia-Pacific is the largest regional market for Semiconductor Grinding Wheels, accounting for more than 79% of the global market. This strong concentration reflects the region's central position in global semiconductor manufacturing, wafer fabrication, and advanced packaging activities. Asia-Pacific benefits from a highly developed semiconductor industrial base, large-scale wafer production capacity, and a broad concentration of downstream electronics and chip manufacturing demand. As wafer manufacturing continues to scale up and process requirements become more stringent, demand in this region remains particularly strong for high-performance grinding consumables that can support productivity, quality stability, and cost control.

The development of the Semiconductor Grinding Wheels market is supported by multiple driving factors. Continuous expansion of the semiconductor industry is creating sustained demand for wafer thinning and back grinding consumables. The increasing penetration of advanced packaging technologies is driving the need for higher-precision grinding solutions, especially in applications requiring better surface quality and tighter dimensional control. The rapid growth of compound semiconductor materials and specialty wafers is expanding the addressable market for high-performance grinding wheels with stable removal rates and long service life.

At the same time, the Semiconductor Grinding Wheels market also faces several restraints. The industry is highly dependent on semiconductor capital spending cycles, which can lead to fluctuations in consumables demand when wafer fab utilization weakens. Product qualification requirements are often stringent, and long validation cycles with semiconductor manufacturers can delay market entry for new suppliers. The technical demands of advanced wafer processing require continuous investment in abrasive formulation, bond technology, and microstructure design, raising the barrier for product development and increasing cost pressure on manufacturers. Raw material supply, especially for high-quality abrasive and bond materials, can also affect production cost and delivery stability. In addition, customer expectations for longer lifetime, lower grinding resistance, and more stable removal performance place ongoing pressure on suppliers to maintain both innovation and cost competitiveness.

This report studies the global Semiconductor Grinding Wheels production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Semiconductor Grinding Wheels total production and demand, 2021-2032, (K Units)

Global Semiconductor Grinding Wheels total production value, 2021-2032, (USD Million)

Global Semiconductor Grinding Wheels production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Semiconductor Grinding Wheels consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Semiconductor Grinding Wheels domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Grinding Wheels production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Semiconductor Grinding Wheels production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Semiconductor Grinding Wheels production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Semiconductor Grinding Wheels 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 (JP), Saint-Gobain (FR), TOKYO SEIMITSU (JP), EHWA DIAMOND (KR), Asahi Diamond Industrial Co.,Ltd. (JP), SAESOL (KR), Noritake (JP), Meister Abrasives (CH), KINIK COMPANY (TW), A.L.M.T. Corp. (JP), 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 Grinding Wheels market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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 Semiconductor Grinding Wheels Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Grinding Wheels Market, Segmentation by Type:

Coarse Grinding (#325-#1000)

Fine Grinding (#2000-#8000)

Global Semiconductor Grinding Wheels Market, Segmentation by Wafer Type:

Si Wafer

SiC Wafer

Others

Global Semiconductor Grinding Wheels Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global Semiconductor Grinding Wheels Market, Segmentation by Application:

300 mm Wafer

200 mm Wafer

Others

Companies Profiled:

DISCO (JP)

Saint-Gobain (FR)

TOKYO SEIMITSU (JP)

EHWA DIAMOND (KR)

Asahi Diamond Industrial Co.,Ltd. (JP)

SAESOL (KR)

Noritake (JP)

Meister Abrasives (CH)

KINIK COMPANY (TW)

A.L.M.T. Corp. (JP)

Sinomach-pi (CN)

Sail Science & Technology (CN)

Tokyo Diamond Tools (JP)

Nanjing Sanchao (CN)

UKAM (US)

Key Questions Answered:

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

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