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# Global Semiconductor Wafer Dicing Blades Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/GA860BE7DBEFEN.html
Date: August 2026
Pages: 137
Price: US$ 3,480.00 (Single User License)
ID: GA860BE7DBEFEN

## Abstracts

According to our (Global Info Research) latest study, the global Semiconductor Wafer Dicing Blades market size was valued at US$ 478 million in 2025 and is forecast to a readjusted size of US$ 703 million by 2032 with a CAGR of 5.7% during review period.

Semiconductor wafer dicing blades are ultra-thin circular precision tools mounted on high-speed dicing saw spindles to mechanically cut processed semiconductor wafers and separate them into individual dies. The products generally consist of diamond abrasives embedded in electroformed nickel, resin, or metal bonds and are primarily supplied as hub blades or hubless blades. Cutting-edge thickness typically ranges from approximately 9 to 120 micrometers, with products between 20 and 60 micrometers representing the principal commercial specifications. Key performance parameters include kerf width, frontside and backside chipping, cutting speed, blade life, self-sharpening capability, and batch consistency.

Semiconductor wafer dicing blades are primarily used to process silicon, silicon carbide, gallium nitride, gallium arsenide, indium phosphide, lithium tantalate, and other semiconductor or functional wafers. Major applications include logic devices, memory devices, power semiconductors, radio-frequency devices, optoelectronic devices, microelectromechanical systems, and sensors. These blades are critical consumable precision tools in semiconductor back-end manufacturing. The category excludes ingot slicing blades, wafer thinning wheels, semiconductor package substrate singulation blades, general-purpose glass and ceramic cutting blades, laser dicing equipment, and plasma dicing equipment.

In 2025, global semiconductor wafer dicing blade production reached approximately 5.8

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million to 6.1 million pieces, while the weighted FOB price of mainstream products ranged from approximately USD 74 to USD 82 per piece. Standard electroformed nickel-bond hub and hubless blades were mainly concentrated within this range, while ultra-thin products below 20 micrometers, blades designed for silicon carbide and compound semiconductor wafers, and customized products for specialized dicing-street structures generally commanded higher unit prices.

The rapid expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, advanced logic devices, and data center infrastructure is supporting continued investment in high-end wafer manufacturing, wafer-level processing, and back-end dicing capacity. As dies become smaller, wafers become thinner, and dicing streets become narrower, manufacturers require tighter kerf control, reduced backside chipping, higher die strength, and greater process stability. These requirements are increasing demand for ultra-thin cutting edges, highly uniform diamond abrasives, and precisely controlled electroformed bond systems. The growing use of silicon carbide, gallium nitride, and gallium arsenide wafers in electric vehicles, industrial power systems, renewable energy, and communications infrastructure is also creating opportunities for specialized bond formulations, high-rigidity blades, and low-damage dicing solutions. Semiconductor manufacturing localization and supply-chain security initiatives across China, South Korea, Taiwan, North America, and Europe are further supporting suppliers with local production, rapid qualification, and on-site technical service capabilities.

Industry Chain and Downstream Demand Trends

The upstream supply chain for semiconductor wafer dicing blades includes synthetic diamond powders, high-purity nickel and nickel salts, resins, metal-bond materials, aluminum hubs, and precision blade substrates. Midstream processes include abrasive classification, electroforming, molding and curing, sintering, precision dressing, dynamic balancing, and application qualification. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, wafer foundries, and specialized wafer dicing service providers. Although blade expenditure represents only a small proportion of total wafer value, blade performance directly affects chipping, cracking, delamination, die strength, and final production yield. Customers therefore generally require extensive process qualification and are unlikely to change suppliers solely on the basis of initial purchasing price.

Future demand will increasingly emphasize the systematic matching of blades with

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wafer materials, dicing-street structures, spindle systems, cooling fluids, and process parameters. Competition is expected to shift from unit blade pricing toward cost per cutting length, replacement frequency, equipment utilization, and overall production yield. Stealth laser dicing, laser full-cut processing, and plasma dicing will gain adoption in selected ultra-thin wafer and advanced-device applications. Nevertheless, mechanical dicing blades will retain an important position in silicon wafers, power devices, radio-frequency devices, and most compound semiconductor wafer applications because of their mature processes, broad installed equipment base, processing flexibility, and controllable high-volume production costs.

This report is a detailed and comprehensive analysis for global Semiconductor Wafer Dicing Blades 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 Semiconductor Wafer Dicing Blades market size and forecasts, in consumption value ($ Million), sales quantity (Million Pcs), and average selling prices (US$/Pcs), 2021-2032

Global Semiconductor Wafer Dicing Blades market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Million Pcs), and average selling prices (US$/Pcs), 2021-2032

Global Semiconductor Wafer Dicing Blades market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Million Pcs), and average selling prices (US$/Pcs), 2021-2032

Global Semiconductor Wafer Dicing Blades market shares of main players, shipments in revenue ($ Million), sales quantity (Million Pcs), and ASP (US$/Pcs), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

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To assess the growth potential for Semiconductor Wafer Dicing Blades

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 Semiconductor Wafer Dicing Blades 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 DISCO Corporation, Asahi Diamond Industrial Co., Ltd., Kulicke and Soffa Industries, Inc., Saint-Gobain S.A., Thermocarbon Inc., UKAM Industrial Superhard Tools, YMB Co., Ltd., EHWA DIAMOND INDUSTRIAL CO., LTD., YDI Co., Ltd., KODIS Co., Ltd., etc.

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

Market Segmentation

Semiconductor Wafer Dicing Blades 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

Hub Blades

Hubless Blades

Market segment by Wafer Material

Silicon Wafers

Silicon Carbide and Gallium Nitride Wafers

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Gallium Arsenide and Indium Phosphide Wafers

Others

Market segment by Blade Thickness

Less Than 20 Micrometers

20 Micrometers to Less Than 40 Micrometers

40 Micrometers to Less Than 80 Micrometers

80 Micrometers and Above

Market segment by Bond Type

Electroformed Nickel Bond

Resin Bond

Others

Market segment by Application

Logic and Memory Devices

Power Semiconductor Devices

Optoelectronic and Radio Frequency Devices

MEMS and Sensor Devices

Major players covered

DISCO Corporation

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Asahi Diamond Industrial Co., Ltd.

Kulicke and Soffa Industries, Inc.

Saint-Gobain S.A.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

YDI Co., Ltd.

KODIS Co., Ltd.

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.

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)

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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 Semiconductor Wafer Dicing Blades product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Semiconductor Wafer Dicing Blades, with price, sales quantity, revenue, and global market share of Semiconductor Wafer Dicing Blades from 2021 to 2026.

Chapter 3, the Semiconductor Wafer Dicing Blades competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Semiconductor Wafer Dicing Blades 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 Semiconductor Wafer Dicing Blades 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 Semiconductor Wafer Dicing Blades.

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Chapter 14 and 15, to describe Semiconductor Wafer Dicing Blades sales channel, distributors, customers, research findings and conclusion.

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## 3 COMPETITIVE ENVIRONMENT: SEMICONDUCTOR WAFER DICING BLADES BY MANUFACTURER

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info@marketpublishers.com

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