

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

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Abstracts

The global Semiconductor Wafer Dicing Blades market size is expected to reach \$ 703 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Semiconductor Wafer 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., 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Semiconductor Wafer 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 Wafer Dicing Blades Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Wafer Dicing Blades Market, Segmentation by Type:

Hub Blades

Hubless Blades

Global Semiconductor Wafer Dicing Blades Market, Segmentation by Wafer Material:

Silicon Wafers

Silicon Carbide and Gallium Nitride Wafers

Gallium Arsenide and Indium Phosphide Wafers

Others

Global Semiconductor Wafer Dicing Blades Market, Segmentation 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

Global Semiconductor Wafer Dicing Blades Market, Segmentation by Bond Type:

Electroformed Nickel Bond

Resin Bond

Others

Global Semiconductor Wafer 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.

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.

Key Questions Answered:

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

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