

Global Semiconductor Wafer Dicing 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 Semiconductor Wafer Dicing Equipment market size was valued at US\$ 1996 million in 2025 and is forecast to a readjusted size of US\$ 3139 million by 2032 with a CAGR of 6.6% during review period.

Semiconductor wafer dicing equipment comprises dedicated manufacturing systems used to separate a processed semiconductor wafer into individual dies along predefined streets, scribe lines, or device contours. The category includes mechanical blade dicing saws, laser-ablation and full-cut systems, laser grooving tools, internal-modification or stealth-dicing systems, thermal laser separation platforms, water-jet-guided laser systems, and dedicated plasma-dicing equipment. A typical system incorporates wafer or tape-frame handling, a vacuum chuck or process carrier, precision spindle or laser optics, high-accuracy linear and rotary motion stages, machine vision and alignment, depth or focal-position control, cooling and cleaning, particle management, recipe software, wafer-map functions, and automated loading and unloading. Important performance parameters include supported wafer diameter and thickness, kerf width, positioning accuracy, spindle speed, feed rate, depth control, chipping, heat-affected zone, die strength, particle generation, throughput, process repeatability, and overall equipment effectiveness. These systems are used in the singulation of silicon logic and memory devices, power semiconductors, SiC and GaN devices, RF and compound-semiconductor products, MEMS, image sensors, LEDs, photonic and silicon-photonic devices, as well as wafer-level and advanced-packaging products. The industry increasingly combines equipment engineering with application-specific process development because the optimum separation method depends on wafer material, device structure, wafer thickness, street design, metallization, dielectric layers, target

die strength, cleanliness requirements, and downstream packaging architecture.

Semiconductor wafer dicing equipment represents a relatively small but technologically demanding segment of the semiconductor equipment industry. Its value proposition is not limited to cutting speed: the equipment must consistently control chipping, cracking, particle generation, thermal damage, kerf loss, and final die strength while maintaining high throughput and repeatability. Process performance is closely linked to wafer thickness, street design, dielectric and metallization stacks, substrate material, device geometry, and downstream packaging requirements. Mechanical blade dicing remains the workhorse for a large portion of mainstream silicon production because of its established process base, attractive cost of ownership, and mature consumables ecosystem. However, the addressable equipment category has broadened to include laser full-cut, laser grooving, internal modification and stealth dicing, thermal laser separation, water-jet-guided laser processing, and plasma-based die singulation. This broader technology landscape creates a large discovery pool of equipment and laser-system companies, but only a smaller group has a clearly documented, commercially available, semiconductor-specific wafer-dicing platform.

Demand growth is increasingly driven by advanced packaging, HBM, chiplets, thin wafers, power semiconductors, SiC and GaN devices, MEMS, image sensors, RF products, and photonic devices. These applications place greater emphasis on narrow streets, low mechanical stress, minimal contamination, high die strength, and the ability to process difficult or expensive materials. As a result, laser and plasma technologies are expected to grow faster than conventional mechanical systems, although blade dicing will remain economically competitive in a large range of mainstream silicon applications. Future production flows will increasingly combine technologies, such as laser grooving followed by blade dicing, internal modification followed by tape expansion, dicing-after-grinding, dicing-before-grinding, or masked plasma singulation. Competition will consequently shift from stand-alone machine specifications toward integrated capabilities in process development, materials databases, automation, yield control, consumables compatibility, and regional service.

From a product-route perspective, the industry is moving from a predominantly blade-based structure toward a more diversified combination of mechanical, laser, plasma, and hybrid singulation processes. Blade dicing will remain indispensable for mainstream silicon wafers, mature-node devices, analog products, and cost-sensitive applications because of its proven throughput, relatively low equipment cost, and mature consumables supply chain. Laser grooving is increasingly used to remove low-k dielectric layers, metal structures, or difficult surface materials before final blade cutting,

while laser full-cut and stealth-dicing systems are gaining adoption in thin wafers, narrow streets, SiC, GaAs, GaN, MEMS, photonics, and other high-value applications. Thermal laser separation and water-jet-guided laser technologies offer advantages in die strength, reduced contamination, and lower mechanical stress for selected materials. Plasma dicing provides a fundamentally different route by using patterned dry etching to achieve narrow kerfs, high die density, and flexible chip geometries, although mask preparation, process integration, and equipment economics still restrict its wider adoption. Future production flows are therefore likely to involve more hybrid processes, including laser grooving followed by blade dicing, internal modification followed by tape expansion, dicing-before-grinding, dicing-after-grinding, and masked plasma singulation. Equipment competitiveness will increasingly depend on application-specific process databases, material compatibility, yield control, automation, and integration with upstream thinning and downstream die-handling processes.

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

Global Semiconductor Wafer Dicing 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 Semiconductor Wafer Dicing 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 Semiconductor Wafer Dicing 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 Semiconductor Wafer Dicing 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 Semiconductor Wafer Dicing 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 DISCO Corporation, Tokyo Seimitsu Co., Ltd., GL Tech Co., Ltd., ASMPT Limited, Hanmi Semiconductor Co., Ltd., KLA Corporation, AP Systems Corporation, EO Technics Co., Ltd., Plasma-Therm LLC, 3D-Micromac AG, etc.

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

Market Segmentation

Semiconductor Wafer Dicing 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

Blade Dicing Equipment

Laser Dicing Equipment

Plasma Dicing Equipment

Other

Market segment by Wafer Size

Up to 150 mm

200 mm

300 mm

Other

Market segment by Wafer Material

Silicon

Silicon Carbide

III-V Compound Semiconductors

Sapphire

Other Specialty Materials

Market segment by Application

Logic and Memory Devices

Power Semiconductor Devices

MEMS and Sensors

Photonics and LED Devices

Advanced Packaging and Wafer-level Packaging

Other

Major players covered

DISCO Corporation

Tokyo Seimitsu Co., Ltd.

GL Tech Co., Ltd.

ASMPT Limited

Hanmi Semiconductor Co., Ltd.

KLA Corporation

AP Systems Corporation

EO Technics Co., Ltd.

Plasma-Therm LLC

3D-Micromac AG

Synova S.A.

Panasonic Holdings Corporation

Han's Laser Technology Industry Group Co., Ltd.

HGTECH Co., Ltd.

Suzhou Maxwell Technologies Co., Ltd.

China Electronics Technology Group Corporation

Suzhou Delphi Laser Co., Ltd.

Samco Inc.

Shenyang Heyan Technology Co., Ltd.

NeonTech Co., Ltd.

4JET Holding GmbH

Tongtai Machine & Tool Co., Ltd.

NPM Group

Jiangsu Jingchuang Advanced Electronic Technology Co., Ltd.

Shenzhen Hi-Test Semiconductor Equipment Co., Ltd.

Dongguan Strong Laser Advanced Equipment Co., Ltd.

Zhuhai Bojay Electronics Co., Ltd.

Hefei Accuracy Intelligent Equipment Co., Ltd.

Zhejiang Darcet Technology Co., Ltd.

Suzhou Lumi Laser Technology Co., Ltd.

Shenyang Hanway Technology Co., Ltd.

Lidrotec GmbH

Logitech 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)

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

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

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

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

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