

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

<https://marketpublishers.com/r/GBAFC581B48BEN.html>

Date: August 2026

Pages: 209

Price: US\$ 4,480.00 (Single User License)

ID: GBAFC581B48BEN

Abstracts

The global Semiconductor Wafer Dicing Equipment market size is expected to reach \$ 3139 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

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

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

Highlights and key features of the study

Global Semiconductor Wafer Dicing Equipment total production and demand, 2021-2032, (Units)

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

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

Global Semiconductor Wafer Dicing Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

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

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

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

Global Semiconductor Wafer Dicing Equipment production by Application, production,

value, CAGR, 2021-2032, (USD Million) & (Units)

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Semiconductor Wafer Dicing Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Wafer Dicing Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Wafer Dicing Equipment Market, Segmentation by Type:

Blade Dicing Equipment

Laser Dicing Equipment

Plasma Dicing Equipment

Other

Global Semiconductor Wafer Dicing Equipment Market, Segmentation by Wafer Size:

Up to 150 mm

200 mm

300 mm

Other

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

Silicon

Silicon Carbide

III-V Compound Semiconductors

Sapphire

Other Specialty Materials

Global Semiconductor Wafer Dicing Equipment Market, Segmentation by Application:

Logic and Memory Devices

Power Semiconductor Devices

MEMS and Sensors

Photonics and LED Devices

Advanced Packaging and Wafer-level Packaging

Other

Companies Profiled:

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.

Key Questions Answered:

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

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