

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

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Abstracts

The global Semiconductor Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer 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 Wafer Grinding Wheels production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Semiconductor Wafer 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 Wafer 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 Wafer Grinding Wheels Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Wafer Grinding Wheels Market, Segmentation by Type:

Coarse Grinding (#325-#1000)

Fine Grinding (#2000-#8000)

Global Semiconductor Wafer Grinding Wheels Market, Segmentation by Wafer Type:

Si Wafer

SiC Wafer

Others

Global Semiconductor Wafer Grinding Wheels Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global Semiconductor Wafer Grinding Wheels Market, Segmentation by Application:

12 Inch Wafer

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

Contents

1 SUPPLY SUMMARY

- 1.1 Semiconductor Wafer Grinding Wheels Introduction
- 1.2 World Semiconductor Wafer Grinding Wheels Supply & Forecast
 - 1.2.1 World Semiconductor Wafer Grinding Wheels Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Semiconductor Wafer Grinding Wheels Production (2021-2032)
 - 1.2.3 World Semiconductor Wafer Grinding Wheels Pricing Trends (2021-2032)
- 1.3 World Semiconductor Wafer Grinding Wheels Production by Region (Based on Production Site)
 - 1.3.1 World Semiconductor Wafer Grinding Wheels Production Value by Region (2021-2032)
 - 1.3.2 World Semiconductor Wafer Grinding Wheels Production by Region (2021-2032)
 - 1.3.3 World Semiconductor Wafer Grinding Wheels Average Price by Region (2021-2032)
 - 1.3.4 North America Semiconductor Wafer Grinding Wheels Production (2021-2032)
 - 1.3.5 Europe Semiconductor Wafer Grinding Wheels Production (2021-2032)
 - 1.3.6 China Semiconductor Wafer Grinding Wheels Production (2021-2032)
 - 1.3.7 Japan Semiconductor Wafer Grinding Wheels Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Semiconductor Wafer Grinding Wheels Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Semiconductor Wafer Grinding Wheels Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Semiconductor Wafer Grinding Wheels Demand (2021-2032)
- 2.2 World Semiconductor Wafer Grinding Wheels Consumption by Region
 - 2.2.1 World Semiconductor Wafer Grinding Wheels Consumption by Region (2021-2026)
 - 2.2.2 World Semiconductor Wafer Grinding Wheels Consumption Forecast by Region (2027-2032)
- 2.3 United States Semiconductor Wafer Grinding Wheels Consumption (2021-2032)
- 2.4 China Semiconductor Wafer Grinding Wheels Consumption (2021-2032)
- 2.5 Europe Semiconductor Wafer Grinding Wheels Consumption (2021-2032)
- 2.6 Japan Semiconductor Wafer Grinding Wheels Consumption (2021-2032)
- 2.7 South Korea Semiconductor Wafer Grinding Wheels Consumption (2021-2032)

2.8 ASEAN Semiconductor Wafer Grinding Wheels Consumption (2021-2032)

2.9 India Semiconductor Wafer Grinding Wheels Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Semiconductor Wafer Grinding Wheels Production Value by Manufacturer (2021-2026)

3.2 World Semiconductor Wafer Grinding Wheels Production by Manufacturer (2021-2026)

3.3 World Semiconductor Wafer Grinding Wheels Average Price by Manufacturer (2021-2026)

3.4 Semiconductor Wafer Grinding Wheels Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Semiconductor Wafer Grinding Wheels Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Semiconductor Wafer Grinding Wheels in 2025

3.5.3 Global Concentration Ratios (CR8) for Semiconductor Wafer Grinding Wheels in 2025

3.6 Semiconductor Wafer Grinding Wheels Market: Overall Company Footprint Analysis

3.6.1 Semiconductor Wafer Grinding Wheels Market: Region Footprint

3.6.2 Semiconductor Wafer Grinding Wheels Market: Company Product Type Footprint

3.6.3 Semiconductor Wafer Grinding Wheels Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Semiconductor Wafer Grinding Wheels Production Value Comparison

4.1.1 United States VS China: Semiconductor Wafer Grinding Wheels Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Semiconductor Wafer Grinding Wheels Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Semiconductor Wafer Grinding Wheels Production Comparison

4.2.1 United States VS China: Semiconductor Wafer Grinding Wheels Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Semiconductor Wafer Grinding Wheels Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Semiconductor Wafer Grinding Wheels Consumption Comparison

4.3.1 United States VS China: Semiconductor Wafer Grinding Wheels Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Semiconductor Wafer Grinding Wheels Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Semiconductor Wafer Grinding Wheels Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value (2021-2026)

4.4.3 United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production (2021-2026)

4.5 China Based Semiconductor Wafer Grinding Wheels Manufacturers and Market Share

4.5.1 China Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value (2021-2026)

4.5.3 China Based Manufacturers Semiconductor Wafer Grinding Wheels Production (2021-2026)

4.6 Rest of World Based Semiconductor Wafer Grinding Wheels Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

- 5.1 World Semiconductor Wafer Grinding Wheels Market Size Overview by Type: 2021 VS 2025 VS 2032
- 5.2 Segment Introduction by Type
 - 5.2.1 Coarse Grinding (#325-#1000)
 - 5.2.2 Fine Grinding (#2000-#8000)
- 5.3 Market Segment by Type
 - 5.3.1 World Semiconductor Wafer Grinding Wheels Production by Type (2021-2032)
 - 5.3.2 World Semiconductor Wafer Grinding Wheels Production Value by Type (2021-2032)
 - 5.3.3 World Semiconductor Wafer Grinding Wheels Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY WAFER TYPE

- 6.1 World Semiconductor Wafer Grinding Wheels Market Size Overview by Wafer Type: 2021 VS 2025 VS 2032
- 6.2 Segment Introduction by Wafer Type
 - 6.2.1 Si Wafer
 - 6.2.2 SiC Wafer
 - 6.2.3 Others
- 6.3 Market Segment by Wafer Type
 - 6.3.1 World Semiconductor Wafer Grinding Wheels Production by Wafer Type (2021-2032)
 - 6.3.2 World Semiconductor Wafer Grinding Wheels Production Value by Wafer Type (2021-2032)
 - 6.3.3 World Semiconductor Wafer Grinding Wheels Average Price by Wafer Type (2021-2032)

7 MARKET ANALYSIS BY SALES CHANNEL

- 7.1 World Semiconductor Wafer Grinding Wheels Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Sales Channel
 - 7.2.1 Direct Sales
 - 7.2.2 Indirect Sales
- 7.3 Market Segment by Sales Channel
 - 7.3.1 World Semiconductor Wafer Grinding Wheels Production by Sales Channel (2021-2032)
 - 7.3.2 World Semiconductor Wafer Grinding Wheels Production Value by Sales Channel (2021-2032)

7.3.3 World Semiconductor Wafer Grinding Wheels Average Price by Sales Channel (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Semiconductor Wafer Grinding Wheels Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 12 Inch Wafer

8.2.2 8 Inch Wafer

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World Semiconductor Wafer Grinding Wheels Production by Application (2021-2032)

8.3.2 World Semiconductor Wafer Grinding Wheels Production Value by Application (2021-2032)

8.3.3 World Semiconductor Wafer Grinding Wheels Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 DISCO (JP)

9.1.1 DISCO (JP) Details

9.1.2 DISCO (JP) Major Business

9.1.3 DISCO (JP) Semiconductor Wafer Grinding Wheels Product and Services

9.1.4 DISCO (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 DISCO (JP) Recent Developments/Updates

9.1.6 DISCO (JP) Competitive Strengths & Weaknesses

9.2 Saint-Gobain (FR)

9.2.1 Saint-Gobain (FR) Details

9.2.2 Saint-Gobain (FR) Major Business

9.2.3 Saint-Gobain (FR) Semiconductor Wafer Grinding Wheels Product and Services

9.2.4 Saint-Gobain (FR) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Saint-Gobain (FR) Recent Developments/Updates

9.2.6 Saint-Gobain (FR) Competitive Strengths & Weaknesses

9.3 TOKYO SEIMITSU (JP)

9.3.1 TOKYO SEIMITSU (JP) Details

9.3.2 TOKYO SEIMITSU (JP) Major Business

9.3.3 TOKYO SEIMITSU (JP) Semiconductor Wafer Grinding Wheels Product and Services

9.3.4 TOKYO SEIMITSU (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 TOKYO SEIMITSU (JP) Recent Developments/Updates

9.3.6 TOKYO SEIMITSU (JP) Competitive Strengths & Weaknesses

9.4 EHWA DIAMOND (KR)

9.4.1 EHWA DIAMOND (KR) Details

9.4.2 EHWA DIAMOND (KR) Major Business

9.4.3 EHWA DIAMOND (KR) Semiconductor Wafer Grinding Wheels Product and Services

9.4.4 EHWA DIAMOND (KR) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 EHWA DIAMOND (KR) Recent Developments/Updates

9.4.6 EHWA DIAMOND (KR) Competitive Strengths & Weaknesses

9.5 Asahi Diamond Industrial Co.,Ltd. (JP)

9.5.1 Asahi Diamond Industrial Co.,Ltd. (JP) Details

9.5.2 Asahi Diamond Industrial Co.,Ltd. (JP) Major Business

9.5.3 Asahi Diamond Industrial Co.,Ltd. (JP) Semiconductor Wafer Grinding Wheels Product and Services

9.5.4 Asahi Diamond Industrial Co.,Ltd. (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Asahi Diamond Industrial Co.,Ltd. (JP) Recent Developments/Updates

9.5.6 Asahi Diamond Industrial Co.,Ltd. (JP) Competitive Strengths & Weaknesses

9.6 SAESOL (KR)

9.6.1 SAESOL (KR) Details

9.6.2 SAESOL (KR) Major Business

9.6.3 SAESOL (KR) Semiconductor Wafer Grinding Wheels Product and Services

9.6.4 SAESOL (KR) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 SAESOL (KR) Recent Developments/Updates

9.6.6 SAESOL (KR) Competitive Strengths & Weaknesses

9.7 Noritake (JP)

9.7.1 Noritake (JP) Details

9.7.2 Noritake (JP) Major Business

9.7.3 Noritake (JP) Semiconductor Wafer Grinding Wheels Product and Services

9.7.4 Noritake (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.7.5 Noritake (JP) Recent Developments/Updates
- 9.7.6 Noritake (JP) Competitive Strengths & Weaknesses
- 9.8 Meister Abrasives (CH)
 - 9.8.1 Meister Abrasives (CH) Details
 - 9.8.2 Meister Abrasives (CH) Major Business
 - 9.8.3 Meister Abrasives (CH) Semiconductor Wafer Grinding Wheels Product and Services
 - 9.8.4 Meister Abrasives (CH) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Meister Abrasives (CH) Recent Developments/Updates
 - 9.8.6 Meister Abrasives (CH) Competitive Strengths & Weaknesses
- 9.9 KINIK COMPANY (TW)
 - 9.9.1 KINIK COMPANY (TW) Details
 - 9.9.2 KINIK COMPANY (TW) Major Business
 - 9.9.3 KINIK COMPANY (TW) Semiconductor Wafer Grinding Wheels Product and Services
 - 9.9.4 KINIK COMPANY (TW) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 KINIK COMPANY (TW) Recent Developments/Updates
 - 9.9.6 KINIK COMPANY (TW) Competitive Strengths & Weaknesses
- 9.10 A.L.M.T. Corp. (JP)
 - 9.10.1 A.L.M.T. Corp. (JP) Details
 - 9.10.2 A.L.M.T. Corp. (JP) Major Business
 - 9.10.3 A.L.M.T. Corp. (JP) Semiconductor Wafer Grinding Wheels Product and Services
 - 9.10.4 A.L.M.T. Corp. (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 A.L.M.T. Corp. (JP) Recent Developments/Updates
 - 9.10.6 A.L.M.T. Corp. (JP) Competitive Strengths & Weaknesses
- 9.11 Sinomach-pi (CN)
 - 9.11.1 Sinomach-pi (CN) Details
 - 9.11.2 Sinomach-pi (CN) Major Business
 - 9.11.3 Sinomach-pi (CN) Semiconductor Wafer Grinding Wheels Product and Services
 - 9.11.4 Sinomach-pi (CN) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Sinomach-pi (CN) Recent Developments/Updates
 - 9.11.6 Sinomach-pi (CN) Competitive Strengths & Weaknesses
- 9.12 Sail Science & Technology (CN)
 - 9.12.1 Sail Science & Technology (CN) Details

- 9.12.2 Sail Science & Technology (CN) Major Business
- 9.12.3 Sail Science & Technology (CN) Semiconductor Wafer Grinding Wheels Product and Services
- 9.12.4 Sail Science & Technology (CN) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.12.5 Sail Science & Technology (CN) Recent Developments/Updates
- 9.12.6 Sail Science & Technology (CN) Competitive Strengths & Weaknesses
- 9.13 Tokyo Diamond Tools (JP)
- 9.13.1 Tokyo Diamond Tools (JP) Details
- 9.13.2 Tokyo Diamond Tools (JP) Major Business
- 9.13.3 Tokyo Diamond Tools (JP) Semiconductor Wafer Grinding Wheels Product and Services
- 9.13.4 Tokyo Diamond Tools (JP) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.13.5 Tokyo Diamond Tools (JP) Recent Developments/Updates
- 9.13.6 Tokyo Diamond Tools (JP) Competitive Strengths & Weaknesses
- 9.14 Nanjing Sanchao (CN)
- 9.14.1 Nanjing Sanchao (CN) Details
- 9.14.2 Nanjing Sanchao (CN) Major Business
- 9.14.3 Nanjing Sanchao (CN) Semiconductor Wafer Grinding Wheels Product and Services
- 9.14.4 Nanjing Sanchao (CN) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.14.5 Nanjing Sanchao (CN) Recent Developments/Updates
- 9.14.6 Nanjing Sanchao (CN) Competitive Strengths & Weaknesses
- 9.15 UKAM (US)
- 9.15.1 UKAM (US) Details
- 9.15.2 UKAM (US) Major Business
- 9.15.3 UKAM (US) Semiconductor Wafer Grinding Wheels Product and Services
- 9.15.4 UKAM (US) Semiconductor Wafer Grinding Wheels Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.15.5 UKAM (US) Recent Developments/Updates
- 9.15.6 UKAM (US) Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Semiconductor Wafer Grinding Wheels Industry Chain
- 10.2 Semiconductor Wafer Grinding Wheels Upstream Analysis
 - 10.2.1 Semiconductor Wafer Grinding Wheels Core Raw Materials

10.2.2 Main Manufacturers of Semiconductor Wafer Grinding Wheels Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Semiconductor Wafer Grinding Wheels Production Mode

10.6 Semiconductor Wafer Grinding Wheels Procurement Model

10.7 Semiconductor Wafer Grinding Wheels Industry Sales Model and Sales Channels

10.7.1 Semiconductor Wafer Grinding Wheels Sales Model

10.7.2 Semiconductor Wafer Grinding Wheels Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Semiconductor Wafer Grinding Wheels Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Semiconductor Wafer Grinding Wheels Production Value by Region (2021-2026) & (USD Million)

Table 3. World Semiconductor Wafer Grinding Wheels Production Value by Region (2027-2032) & (USD Million)

Table 4. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Region (2021-2026)

Table 5. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Region (2027-2032)

Table 6. World Semiconductor Wafer Grinding Wheels Production by Region (2021-2026) & (K Units)

Table 7. World Semiconductor Wafer Grinding Wheels Production by Region (2027-2032) & (K Units)

Table 8. World Semiconductor Wafer Grinding Wheels Production Market Share by Region (2021-2026)

Table 9. World Semiconductor Wafer Grinding Wheels Production Market Share by Region (2027-2032)

Table 10. World Semiconductor Wafer Grinding Wheels Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Semiconductor Wafer Grinding Wheels Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Semiconductor Wafer Grinding Wheels Major Market Trends

Table 13. World Semiconductor Wafer Grinding Wheels Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Semiconductor Wafer Grinding Wheels Consumption by Region (2021-2026) & (K Units)

Table 15. World Semiconductor Wafer Grinding Wheels Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Semiconductor Wafer Grinding Wheels Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Semiconductor Wafer Grinding Wheels Producers in 2025

Table 18. World Semiconductor Wafer Grinding Wheels Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Semiconductor Wafer Grinding Wheels Producers in 2025

Table 20. World Semiconductor Wafer Grinding Wheels Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Semiconductor Wafer Grinding Wheels Company Evaluation Quadrant

Table 22. World Semiconductor Wafer Grinding Wheels Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Semiconductor Wafer Grinding Wheels Production Site of Key Manufacturer

Table 24. Semiconductor Wafer Grinding Wheels Market: Company Product Type Footprint

Table 25. Semiconductor Wafer Grinding Wheels Market: Company Product Application Footprint

Table 26. Semiconductor Wafer Grinding Wheels Competitive Factors

Table 27. Semiconductor Wafer Grinding Wheels New Entrant and Capacity Expansion Plans

Table 28. Semiconductor Wafer Grinding Wheels Mergers & Acquisitions Activity

Table 29. United States VS China Semiconductor Wafer Grinding Wheels Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Semiconductor Wafer Grinding Wheels Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Semiconductor Wafer Grinding Wheels Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share (2021-2026)

Table 37. China Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Semiconductor Wafer Grinding Wheels Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share (2021-2026)

Table 42. Rest of World Based Semiconductor Wafer Grinding Wheels Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share (2021-2026)

Table 47. World Semiconductor Wafer Grinding Wheels Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Semiconductor Wafer Grinding Wheels Production by Type (2021-2026) & (K Units)

Table 49. World Semiconductor Wafer Grinding Wheels Production by Type (2027-2032) & (K Units)

Table 50. World Semiconductor Wafer Grinding Wheels Production Value by Type (2021-2026) & (USD Million)

Table 51. World Semiconductor Wafer Grinding Wheels Production Value by Type (2027-2032) & (USD Million)

Table 52. World Semiconductor Wafer Grinding Wheels Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Semiconductor Wafer Grinding Wheels Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Semiconductor Wafer Grinding Wheels Production Value by Wafer Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Semiconductor Wafer Grinding Wheels Production by Wafer Type (2021-2026) & (K Units)

Table 56. World Semiconductor Wafer Grinding Wheels Production by Wafer Type (2027-2032) & (K Units)

Table 57. World Semiconductor Wafer Grinding Wheels Production Value by Wafer Type (2021-2026) & (USD Million)

Table 58. World Semiconductor Wafer Grinding Wheels Production Value by Wafer Type (2027-2032) & (USD Million)

Table 59. World Semiconductor Wafer Grinding Wheels Average Price by Wafer Type

(2021-2026) & (US\$/Unit)

Table 60. World Semiconductor Wafer Grinding Wheels Average Price by Wafer Type (2027-2032) & (US\$/Unit)

Table 61. World Semiconductor Wafer Grinding Wheels Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Table 62. World Semiconductor Wafer Grinding Wheels Production by Sales Channel (2021-2026) & (K Units)

Table 63. World Semiconductor Wafer Grinding Wheels Production by Sales Channel (2027-2032) & (K Units)

Table 64. World Semiconductor Wafer Grinding Wheels Production Value by Sales Channel (2021-2026) & (USD Million)

Table 65. World Semiconductor Wafer Grinding Wheels Production Value by Sales Channel (2027-2032) & (USD Million)

Table 66. World Semiconductor Wafer Grinding Wheels Average Price by Sales Channel (2021-2026) & (US\$/Unit)

Table 67. World Semiconductor Wafer Grinding Wheels Average Price by Sales Channel (2027-2032) & (US\$/Unit)

Table 68. World Semiconductor Wafer Grinding Wheels Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Semiconductor Wafer Grinding Wheels Production by Application (2021-2026) & (K Units)

Table 70. World Semiconductor Wafer Grinding Wheels Production by Application (2027-2032) & (K Units)

Table 71. World Semiconductor Wafer Grinding Wheels Production Value by Application (2021-2026) & (USD Million)

Table 72. World Semiconductor Wafer Grinding Wheels Production Value by Application (2027-2032) & (USD Million)

Table 73. World Semiconductor Wafer Grinding Wheels Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Semiconductor Wafer Grinding Wheels Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. DISCO (JP) Basic Information, Manufacturing Base and Competitors

Table 76. DISCO (JP) Major Business

Table 77. DISCO (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 78. DISCO (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. DISCO (JP) Recent Developments/Updates

Table 80. DISCO (JP) Competitive Strengths & Weaknesses

Table 81. Saint-Gobain (FR) Basic Information, Manufacturing Base and Competitors

Table 82. Saint-Gobain (FR) Major Business

Table 83. Saint-Gobain (FR) Semiconductor Wafer Grinding Wheels Product and Services

Table 84. Saint-Gobain (FR) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Saint-Gobain (FR) Recent Developments/Updates

Table 86. Saint-Gobain (FR) Competitive Strengths & Weaknesses

Table 87. TOKYO SEIMITSU (JP) Basic Information, Manufacturing Base and Competitors

Table 88. TOKYO SEIMITSU (JP) Major Business

Table 89. TOKYO SEIMITSU (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 90. TOKYO SEIMITSU (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. TOKYO SEIMITSU (JP) Recent Developments/Updates

Table 92. TOKYO SEIMITSU (JP) Competitive Strengths & Weaknesses

Table 93. EHWA DIAMOND (KR) Basic Information, Manufacturing Base and Competitors

Table 94. EHWA DIAMOND (KR) Major Business

Table 95. EHWA DIAMOND (KR) Semiconductor Wafer Grinding Wheels Product and Services

Table 96. EHWA DIAMOND (KR) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. EHWA DIAMOND (KR) Recent Developments/Updates

Table 98. EHWA DIAMOND (KR) Competitive Strengths & Weaknesses

Table 99. Asahi Diamond Industrial Co.,Ltd. (JP) Basic Information, Manufacturing Base and Competitors

Table 100. Asahi Diamond Industrial Co.,Ltd. (JP) Major Business

Table 101. Asahi Diamond Industrial Co.,Ltd. (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 102. Asahi Diamond Industrial Co.,Ltd. (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Asahi Diamond Industrial Co.,Ltd. (JP) Recent Developments/Updates

Table 104. Asahi Diamond Industrial Co.,Ltd. (JP) Competitive Strengths &

Weaknesses

Table 105. SAESOL (KR) Basic Information, Manufacturing Base and Competitors

Table 106. SAESOL (KR) Major Business

Table 107. SAESOL (KR) Semiconductor Wafer Grinding Wheels Product and Services

Table 108. SAESOL (KR) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. SAESOL (KR) Recent Developments/Updates

Table 110. SAESOL (KR) Competitive Strengths & Weaknesses

Table 111. Noritake (JP) Basic Information, Manufacturing Base and Competitors

Table 112. Noritake (JP) Major Business

Table 113. Noritake (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 114. Noritake (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Noritake (JP) Recent Developments/Updates

Table 116. Noritake (JP) Competitive Strengths & Weaknesses

Table 117. Meister Abrasives (CH) Basic Information, Manufacturing Base and Competitors

Table 118. Meister Abrasives (CH) Major Business

Table 119. Meister Abrasives (CH) Semiconductor Wafer Grinding Wheels Product and Services

Table 120. Meister Abrasives (CH) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Meister Abrasives (CH) Recent Developments/Updates

Table 122. Meister Abrasives (CH) Competitive Strengths & Weaknesses

Table 123. KINIK COMPANY (TW) Basic Information, Manufacturing Base and Competitors

Table 124. KINIK COMPANY (TW) Major Business

Table 125. KINIK COMPANY (TW) Semiconductor Wafer Grinding Wheels Product and Services

Table 126. KINIK COMPANY (TW) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. KINIK COMPANY (TW) Recent Developments/Updates

Table 128. KINIK COMPANY (TW) Competitive Strengths & Weaknesses

Table 129. A.L.M.T. Corp. (JP) Basic Information, Manufacturing Base and Competitors

Table 130. A.L.M.T. Corp. (JP) Major Business

Table 131. A.L.M.T. Corp. (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 132. A.L.M.T. Corp. (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. A.L.M.T. Corp. (JP) Recent Developments/Updates

Table 134. A.L.M.T. Corp. (JP) Competitive Strengths & Weaknesses

Table 135. Sinomach-pi (CN) Basic Information, Manufacturing Base and Competitors

Table 136. Sinomach-pi (CN) Major Business

Table 137. Sinomach-pi (CN) Semiconductor Wafer Grinding Wheels Product and Services

Table 138. Sinomach-pi (CN) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Sinomach-pi (CN) Recent Developments/Updates

Table 140. Sinomach-pi (CN) Competitive Strengths & Weaknesses

Table 141. Sail Science & Technology (CN) Basic Information, Manufacturing Base and Competitors

Table 142. Sail Science & Technology (CN) Major Business

Table 143. Sail Science & Technology (CN) Semiconductor Wafer Grinding Wheels Product and Services

Table 144. Sail Science & Technology (CN) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Sail Science & Technology (CN) Recent Developments/Updates

Table 146. Sail Science & Technology (CN) Competitive Strengths & Weaknesses

Table 147. Tokyo Diamond Tools (JP) Basic Information, Manufacturing Base and Competitors

Table 148. Tokyo Diamond Tools (JP) Major Business

Table 149. Tokyo Diamond Tools (JP) Semiconductor Wafer Grinding Wheels Product and Services

Table 150. Tokyo Diamond Tools (JP) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Tokyo Diamond Tools (JP) Recent Developments/Updates

Table 152. Tokyo Diamond Tools (JP) Competitive Strengths & Weaknesses

Table 153. Nanjing Sanchao (CN) Basic Information, Manufacturing Base and Competitors

Table 154. Nanjing Sanchao (CN) Major Business

Table 155. Nanjing Sanchao (CN) Semiconductor Wafer Grinding Wheels Product and Services

Table 156. Nanjing Sanchao (CN) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Nanjing Sanchao (CN) Recent Developments/Updates

Table 158. Nanjing Sanchao (CN) Competitive Strengths & Weaknesses

Table 159. UKAM (US) Basic Information, Manufacturing Base and Competitors

Table 160. UKAM (US) Major Business

Table 161. UKAM (US) Semiconductor Wafer Grinding Wheels Product and Services

Table 162. UKAM (US) Semiconductor Wafer Grinding Wheels Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. UKAM (US) Recent Developments/Updates

Table 164. UKAM (US) Competitive Strengths & Weaknesses

Table 165. Global Key Players of Semiconductor Wafer Grinding Wheels Upstream (Raw Materials)

Table 166. Global Semiconductor Wafer Grinding Wheels Typical Customers

Table 167. Semiconductor Wafer Grinding Wheels Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Semiconductor Wafer Grinding Wheels Picture

Figure 2. World Semiconductor Wafer Grinding Wheels Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Semiconductor Wafer Grinding Wheels Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Semiconductor Wafer Grinding Wheels Production (2021-2032) & (K Units)

Figure 5. World Semiconductor Wafer Grinding Wheels Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Region (2021-2032)

Figure 7. World Semiconductor Wafer Grinding Wheels Production Market Share by Region (2021-2032)

Figure 8. North America Semiconductor Wafer Grinding Wheels Production (2021-2032) & (K Units)

Figure 9. Europe Semiconductor Wafer Grinding Wheels Production (2021-2032) & (K Units)

Figure 10. China Semiconductor Wafer Grinding Wheels Production (2021-2032) & (K Units)

Figure 11. Japan Semiconductor Wafer Grinding Wheels Production (2021-2032) & (K Units)

Figure 12. Semiconductor Wafer Grinding Wheels Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 15. World Semiconductor Wafer Grinding Wheels Consumption Market Share by Region (2021-2032)

Figure 16. United States Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 17. China Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 18. Europe Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 19. Japan Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 20. South Korea Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 22. India Semiconductor Wafer Grinding Wheels Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Semiconductor Wafer Grinding Wheels by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Semiconductor Wafer Grinding Wheels Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Semiconductor Wafer Grinding Wheels Markets in 2025

Figure 26. United States VS China: Semiconductor Wafer Grinding Wheels Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Semiconductor Wafer Grinding Wheels Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Semiconductor Wafer Grinding Wheels Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share 2025

Figure 30. China Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Semiconductor Wafer Grinding Wheels Production Market Share 2025

Figure 32. World Semiconductor Wafer Grinding Wheels Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Type in 2025

Figure 34. Coarse Grinding (#325-#1000)

Figure 35. Fine Grinding (#2000-#8000)

Figure 36. World Semiconductor Wafer Grinding Wheels Production Market Share by Type (2021-2032)

Figure 37. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Type (2021-2032)

Figure 38. World Semiconductor Wafer Grinding Wheels Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Semiconductor Wafer Grinding Wheels Production Value by Wafer Type, (USD Million), 2021 & 2025 & 2032

Figure 40. World Semiconductor Wafer Grinding Wheels Production Value Market

Share by Wafer Type in 2025

Figure 41. Si Wafer

Figure 42. SiC Wafer

Figure 43. Others

Figure 44. World Semiconductor Wafer Grinding Wheels Production Market Share by Wafer Type (2021-2032)

Figure 45. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Wafer Type (2021-2032)

Figure 46. World Semiconductor Wafer Grinding Wheels Average Price by Wafer Type (2021-2032) & (US\$/Unit)

Figure 47. World Semiconductor Wafer Grinding Wheels Production Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Figure 48. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Sales Channel in 2025

Figure 49. Direct Sales

Figure 50. Indirect Sales

Figure 51. World Semiconductor Wafer Grinding Wheels Production Market Share by Sales Channel (2021-2032)

Figure 52. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Sales Channel (2021-2032)

Figure 53. World Semiconductor Wafer Grinding Wheels Average Price by Sales Channel (2021-2032) & (US\$/Unit)

Figure 54. World Semiconductor Wafer Grinding Wheels Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Application in 2025

Figure 56. 12 Inch Wafer

Figure 57. 8 Inch Wafer

Figure 58. Others

Figure 59. World Semiconductor Wafer Grinding Wheels Production Market Share by Application (2021-2032)

Figure 60. World Semiconductor Wafer Grinding Wheels Production Value Market Share by Application (2021-2032)

Figure 61. World Semiconductor Wafer Grinding Wheels Average Price by Application (2021-2032) & (US\$/Unit)

Figure 62. Semiconductor Wafer Grinding Wheels Industry Chain

Figure 63. Semiconductor Wafer Grinding Wheels Procurement Model

Figure 64. Semiconductor Wafer Grinding Wheels Sales Model

Figure 65. Semiconductor Wafer Grinding Wheels Sales Channels, Direct Sales, and

Distribution

Figure 66. Methodology

Figure 67. Research Process and Data Source

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