

Global Silicon Carbide Manufacturing Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Silicon Carbide Manufacturing Equipment market size is expected to reach \$ 8075 million by 2032, rising at a market growth of 14.0% CAGR during the forecast period (2026-2032).

SiC Semiconductor Manufacturing Equipment refers to the core toolsets required across the SiC value chain?SiC substrate manufacturing, SiC epitaxy, and SiC device front-end processing?with the emphasis on tools that directly determine yield, reliability, and cost per cm²?. Compared with silicon, SiC processing imposes distinct equipment requirements driven by (i) a hard/brittle wafering and surface-finishing regime, and (ii) a device flow that typically depends on heated ion implantation, very high-temperature activation anneals, and robust plasma etching/ohmic-contact formation, making thermal budgets, chamber materials, particle control, and defect sensitivity materially more demanding.

The market can be framed around 10 core equipment categories: (1) SiC crystal growth (PVT) platforms engineered for long-cycle thermal-field stability (e.g., PVA TePla/CGS highlights PVT systems for SiC single crystals); (2) boule processing & wafering (orientation/end-face, slicing) to reduce kerf loss and increase wafers per boule (e.g., DISCO?s KABRA laser ingot slicing applicable to SiC; Okamoto?s SiC ingot grinding/orientation workflow); (3) wafer surface finishing (grinding/lapping/DSP/CMP) to reach tight TTV/warp and nanometer-scale surfaces (e.g., EBARA CMP systems emphasize nano-level planarity and contamination/particle mitigation concepts); (4) cleaning & surface preparation (single-wafer/batch, megasonic, dry-in/dry-out) to manage particle sensitivity (e.g., SCREEN single-wafer cleaner product line); (5) metrology & defect inspection for substrates/epi/patterned wafers?closing feedback loops on BPDs/stacking faults and other SiC-relevant defects (e.g., KLA Candela for SiC-oriented inspection and classification); (6) SiC epitaxy (high-temperature CVD reactors) focused on low defectivity, thickness/doping uniformity, and output per m²

(e.g., AIXTRON G10-SiC for 150/200 mm; ASM PE208 positioned for yield/throughput/cost); (7) lithography & track (often mainstream silicon toolsets, but critical for trench/termination patterning); (8) plasma etch & ash/strip where SiC deep/trench etches demand high-density plasma with low damage and tight profile control (e.g., Oxford Instruments? ICP-RIE tooling and SiC-focused etch content); (9) thin film deposition & metallization (CVD/ALD/PVD) for dielectrics/barriers/metals (Applied Materials summarizes PVD/CVD/ALD as core deposition technologies in semiconductor manufacturing); and (10) doping & thermal processing (implant/activation anneal/oxidation) that defines the SiC ?high-temperature window? (Axcelis highlights high-temperature implant capability and Si/SiC flexibility; Nissin highlights high-temperature SiC implantation; centrotherm positions c.ACTIVATOR for up to 2000?C anneals and c.OXIDATOR for SiC oxidation/anneal up to 1500?C). The equipment challenge in SiC is inherently cross-step coupled: upstream wafering/surface finishing must minimize damage layers and particles on a hard/brittle material; epitaxy must control defect propagation and doping/thickness uniformity that directly map into device blocking/leakage behavior; and device fabrication typically requires heated implantation followed by extreme-temperature activation anneals, while plasma etches (especially trenches/deep features) must balance rate, selectivity, and low-damage surfaces to avoid reliability penalties (interface traps, leakage, oxide integrity). Meanwhile, SiC?s defect spectrum (e.g., BPDs, stacking faults) drives a stronger pull for inspection + classification + feedback earlier in the flow to reduce downstream scrap of high-value processed wafers.

The current industry posture is moving from ?materials bottleneck? to ?manufacturing system competition,? where tool value is measured by throughput ? yield ? repeatability ? cost-of-ownership rather than single-step capability. A second structural driver is the accelerating transition toward 200 mm SiC manufacturing, which triggers a new capex cycle across epitaxy, thermal, metrology, and cleaning. Public disclosures illustrate this clearly: Infineon explicitly references shifting SiC manufacturing to 200-mm wafers; ST announced a high-volume 200-mm SiC manufacturing facility in Catania; and Wolfspeed continues to position 200-mm materials/device scaling as central to its roadmap. On the equipment side, AIXTRON?s G10-SiC shipment milestone explicitly ties demand to ramping 200-mm SiC epitaxy capacity?highlighting high-throughput epitaxy as a key expansion lever.

Looking forward, equipment growth is driven by (i) electrification and energy-efficiency demand from EV (incl. 800V architectures), renewables/storage, industrial power and grid, sustaining SiC capacity build-outs; (ii) the industry pivot from capacity to cost curve reduction, pushing tool roadmaps toward higher wafer output per m?, longer stable runs, and deeper automation/SPC; and (iii) three practical ?battlefields? for tool innovation: wafering/surface finishing (damage/kerf reduction), epitaxy (defectivity +

throughput), and implant/anneal/oxidation/clean (high-temperature capability with ultra-low contamination). Along the chain, upstream consumables and critical parts (hot-zone materials, process gases/chemicals, chamber materials/coatings) increasingly co-evolve with tool design; midstream equipment suppliers differentiate via integrated process windows and service uptime; and downstream SiC substrate/epi/device makers require faster qualification loops?making joint development and platform standardization more common in the 200-mm era.

This report studies the global Silicon Carbide Manufacturing Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Silicon Carbide Manufacturing Equipment total production and demand, 2021-2032, (Units)

Global Silicon Carbide Manufacturing Equipment total production value, 2021-2032, (USD Million)

Global Silicon Carbide Manufacturing Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Silicon Carbide Manufacturing Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Silicon Carbide Manufacturing Equipment domestic production, consumption, key domestic manufacturers and share

Global Silicon Carbide Manufacturing Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Silicon Carbide Manufacturing Equipment production by Wafer Size, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Silicon Carbide Manufacturing Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Silicon Carbide Manufacturing 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 Applied Materials, KLA SPTS, Lam, Tel, Axcelis, Centrotherm, ULVAC, PVA TePla, NAURA, Kokusai, 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 Silicon Carbide Manufacturing 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 Wafer Size, 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 Silicon Carbide Manufacturing Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Silicon Carbide Manufacturing Equipment Market, Segmentation by Wafer Size:

150mm SiC Equipment

200mm SiC Equipment

Others

Global Silicon Carbide Manufacturing Equipment Market, Segmentation by Device Type:

SiC MOSFET

SiC Diode

Others

Global Silicon Carbide Manufacturing Equipment Market, Segmentation by Equipment Type:

SiC Epitaxy/HTCVD Equipment

SiC Thin-Film Deposition & Metallization

SiC Thermal Processing Equipment

SiC Thinning and CMP Equipment

SiC Plasma Etch & Ash/Strip

Wafer Cleaning & Surface Preparation

SiC Ion Implanters

Lithography & Track (Coater/Developer)

SiC Metrology and Inspection

Others

Global Silicon Carbide Manufacturing Equipment Market, Segmentation by Application:

SiC Substrate Manufacturing

SiC Epitaxy Manufacturing

SiC Device Manufacturing

Companies Profiled:

Applied Materials

KLA SPTS

Lam

Tel

Axcelis

Centrotherm

ULVAC

PVA TePla

NAURA

Kokusai

SCREEN

Sumitomo

Nissin Ion

Oxford Instruments

ASML

Nikon

Canon

AIXTRON

ASM/LPE

Accretech

DISCO

Okamoto

Lasertec

Advantest

Teradyne

Crystal Growth & Energy Equipment Inc.

Han's Laser Technology Industry

Beijing TSD Semiconductor Co., Ltd.

Shenzhen Naso Tech

Beijing U-Precision Tech

AMIES Technology

Gurui Semiconductor Equipment (Guangzhou)

Angkun Vision (Beijing) Technology

Key Questions Answered:

1. How big is the global Silicon Carbide Manufacturing Equipment market?
2. What is the demand of the global Silicon Carbide Manufacturing Equipment market?
3. What is the year over year growth of the global Silicon Carbide Manufacturing Equipment market?
4. What is the production and production value of the global Silicon Carbide Manufacturing Equipment market?
5. Who are the key producers in the global Silicon Carbide Manufacturing Equipment market?

6. What are the growth factors driving the market demand?

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