

Global TGV Drilling Equipment Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G650E4D5C444EN.html>

Date: September 2026

Pages: 120

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

ID: G650E4D5C444EN

Abstracts

The global TGV Drilling Equipment market size is expected to reach \$ 244 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

In 2025, the global production of TGV drilling equipment was approximately 30 units, with an average global market price of about US\$4.5 million per unit. In the same year, the total global production capacity of TGV drilling equipment reached 40units. The industry average gross profit margin for this product reached 52%.

TGV drilling equipment refers to high-precision manufacturing equipment that uses lasers to process micron-sized through-holes, blind holes, microgrooves, and other structures on glass substrates or glass wafers. Its core principle is to use a laser beam shaped with ultra-high peak power density to instantaneously act on the interior of the transparent material, forming tiny laser-modified channels. Then, based on the difference in anisotropic etching rates between the modified and unmodified areas, chemical etching is used to form through-holes with a certain aspect ratio and controllable morphology. This equipment mainly solves the problems of glass micro-cracks, edge chipping, rough hole walls, and unstable yields that are easily caused by traditional mechanical drilling and heat-affected laser processing. It is a core process equipment in the fields of advanced packaging, 3D integration, and glass substrate manufacturing.

The TGV drilling equipment industry chain is centered on laser equipment. Upstream, it encompasses core components such as lasers and optical systems, as well as key materials like glass substrates and electronic chemicals. Midstream is equipment manufacturing, with major manufacturers including domestic and international companies such as Di'er Laser, HGLaser, Delong Laser, Han's Semiconductor, and

Taisheng Technology. Their equipment has already been supplied in batches to substrate processing plants like Woge Optoelectronics. Downstream applications cover advanced semiconductor packaging, CPO optical modules, and display panels. Currently, the industry chain is moving from verification to small-batch mass production.

The TGV drilling equipment market has broad prospects. Driven by the explosive growth of AI computing power and the demand for advanced packaging, glass substrates, with their advantages of low loss and anti-warping, have become key materials for next-generation packaging, directly boosting equipment demand. The global TGV laser-induced equipment market is projected to grow from RMB 263 million in 2025 to RMB 417 million in 2032, while the overall market size for advanced packaging TGV is expected to approach US\$8 billion in 2028. With domestic manufacturers making continuous breakthroughs in ultrafast lasers and high-precision processing, domestically produced equipment is entering a period of order fulfillment and is expected to benefit significantly from this billion-dollar blue ocean market.

Report Scope

This report studies the global TGV Drilling Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global TGV Drilling Equipment total production and demand, 2021-2032, (Units)

Global TGV Drilling Equipment total production value, 2021-2032, (USD Million)

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

Global TGV Drilling Equipment consumption by region & country, CAGR,

2021-2032 & (Units)

U.S. VS China: TGV Drilling Equipment domestic production, consumption, key domestic manufacturers and share

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

Global TGV Drilling Equipment production by Through-hole Diameter, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global TGV Drilling Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global TGV Drilling 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 LPKF, DR Laser, Hans Laser, Huagong Tech, Delphilaser, Philoptics, Hymson, Akribis Systems, Guihua Intelligent, E&R Engineering, 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 TGV Drilling 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 Through-hole Diameter, 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 TGV Drilling Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global TGV Drilling Equipment Market, Segmentation by Through-hole Diameter:

< 50 Micrometers

50 – 150 Micrometers

> 150 Micrometers

Global TGV Drilling Equipment Market, Segmentation by Substrate Form:

Dedicated Equipment for Glass Wafers

Dedicated Equipment for Glass Panels

Global TGV Drilling Equipment Market, Segmentation by Application:

RF and Microwave Devices

Optoelectronics and Integrated Optical Modules

MEMS and Microsensors

Others

Companies Profiled:

LPKF

DR Laser

Hans Laser

Huagong Tech

Delphilaser

Philoptics

Hymson

Akribis Systems

Guihua Intelligent

E&R Engineering

MOL Solutions

Key Questions Answered

1. How big is the global TGV Drilling Equipment market?
2. What is the demand of the global TGV Drilling Equipment market?
3. What is the year over year growth of the global TGV Drilling Equipment market?
4. What is the total value of the global TGV Drilling Equipment market?
5. Who are the Major Players in the global TGV Drilling Equipment market?
6. What are the growth factors driving the market demand?

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