

Global Wafer Grinding Wheels 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 Wafer Grinding Wheels market size was valued at US\$ 517 million in 2025 and is forecast to a readjusted size of US\$ 872 million by 2032 with a CAGR of 7.9% during review period.

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. 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 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 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 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 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 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 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 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 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 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 is a detailed and comprehensive analysis for global Wafer Grinding Wheels 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 Wafer Grinding Wheels market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Grinding Wheels market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Grinding Wheels market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Wafer Grinding Wheels market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 Wafer Grinding Wheels

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 Wafer Grinding Wheels 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 (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.

Market Segmentation

Wafer Grinding Wheels 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

Coarse Grinding (#325-#1000)

Fine Grinding (#2000-#8000)

Market segment by Wafer Type

Si Wafer

SiC Wafer

Others

Market segment by Sales Channel

Direct Sales

Indirect Sales

Market segment by Application

12 Inch Wafer

8 Inch Wafer

Others

Major players covered

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)

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 Wafer Grinding Wheels product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Wafer Grinding Wheels 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 Wafer Grinding Wheels 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 Wafer Grinding Wheels.

Chapter 14 and 15, to describe Wafer Grinding Wheels sales channel, distributors, customers, research findings and conclusion.

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