

Global Wafer Thinning & Laminating Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Wafer Thinning & Laminating Machine market size is expected to reach \$ 372 million by 2032, rising at a market growth of 10.5% CAGR during the forecast period (2026-2032).

Wafer thinning and mounting integrated systems are semiconductor back-end and advanced-packaging equipment platforms that integrate wafer backgrinding, stress-relief polishing, cleaning and drying, backgrind protection tape removal, dicing-frame mounting, dicing tape or DAF tape attachment, re-mounting, and ultra-thin wafer handling. The key purpose of these systems is to reduce wafer-handling steps, lower breakage risk, improve process continuity, and support reliable transfer from wafer thinning to dicing or die-attach preparation.

Wafer thinning and mounting integrated systems represent a highly specialized but increasingly important equipment category within advanced packaging. Unlike conventional standalone backgrinders or standalone wafer mounters, these systems integrate or tightly link wafer backgrinding, stress-relief polishing, cleaning and drying, backgrind protection tape removal, dicing-frame mounting, DAF or dicing tape attachment, re-mounting, and ultra-thin wafer handling. The core value of the equipment is not only process integration, but the reduction of handling steps after wafer thinning. As wafer thickness moves toward 50 μ m, 30 μ m, or even thinner levels, wafers become more vulnerable to warpage, cracking, contamination, and handling-induced damage. Therefore, the equipment category is closely tied to yield improvement, thin-wafer stability, and process continuity in W2W, D2W, Chiplet, HBM, SiP, Fan-out, DBG, DAG, and SDBG packaging flows.

From the supply structure perspective, the global market is concentrated in a small

number of high-capability equipment suppliers. DISCO remains the most visible leader, supported by its strong position in wafer backgrinding, dry polishing, DBG/SDBG processes, and grinder-mounter integration. Tokyo Seimitsu / ACCRETECH also has a meaningful position through its polish grinder platform and RM system for thin-wafer tape attachment and tape demounting. Nitto and LINTEC are important module and process-enabling suppliers because of their capabilities in backgrinding tape application, wafer mounting, re-mounting, vacuum mounting, and thin-wafer tape handling. However, their revenue should not be fully treated as integrated thinning-mounting system revenue unless the equipment is clearly linked to a thinning or backgrinding process flow.

Mainland Chinese suppliers are entering the market at an early but strategically important stage. Hwatsing Technology and Leadlap Semiconductor Equipment represent the most relevant domestic players identified in this study, with product evidence linked to 8-inch and 12-inch advanced-packaging thinning and mounting systems. Their emergence reflects the broader localization trend in China's advanced-packaging equipment supply chain. In the near term, domestic suppliers are more likely to gain opportunities in local OSATs, pilot lines, advanced-packaging validation projects, and customized production lines. Over the longer term, their competitiveness will depend on process stability, wafer breakage control, TTV performance, tape attach and detape reliability, automation maturity, SECS/GEM or MES connectivity, and accumulated customer validation.

Demand growth is mainly driven by HBM, Chiplet integration, 2.5D/3D packaging, Fan-out, SiP, and advanced OSAT capacity expansion. These applications require thinner wafers, more complex temporary support and re-mounting flows, and better control of wafer stress and handling risk. Compared with traditional wafer mounters, wafer thinning and mounting integrated systems should grow faster because they solve a more difficult bottleneck in thin-wafer process integration. However, the market will remain a niche equipment segment rather than a high-volume commodity market. Annual unit shipments are limited, customization levels are high, and customer qualification cycles are long. Suppliers with integrated grinding, polishing, cleaning, mounting, tape-removal, and thin-wafer handling expertise will be better positioned than companies offering only one standalone process module.

This report studies the global Wafer Thinning & Laminating Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wafer

Thinning & Laminating Machine 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 Wafer Thinning & Laminating Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Wafer Thinning & Laminating Machine total production and demand, 2021-2032, (Units)

Global Wafer Thinning & Laminating Machine total production value, 2021-2032, (USD Million)

Global Wafer Thinning & Laminating Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Wafer Thinning & Laminating Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Wafer Thinning & Laminating Machine domestic production, consumption, key domestic manufacturers and share

Global Wafer Thinning & Laminating Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Wafer Thinning & Laminating Machine production by Wafer Size, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Wafer Thinning & Laminating Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Wafer Thinning & Laminating Machine 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., Hwatsing Technology Co., Ltd., Leadlap Semiconductor Equipment, Nitto Denko Corporation, LINTEC Corporation, 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 Wafer Thinning & Laminating Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Wafer Thinning & Laminating Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Wafer Thinning & Laminating Machine Market, Segmentation by Wafer Size:

12-inch / 300 mm Wafer

8-inch / 200 mm Wafer

6-inch and Below

Global Wafer Thinning & Laminating Machine Market, Segmentation by Process Coverage:

Grinding + Stress Relief + Mounting

Grinding + Cleaning + Detaping + Mounting

DAF / Dicing Tape Integrated Mounting

DBG / SDBG / DAG Process Support

Other Thin-wafer Handling Processes

Global Wafer Thinning & Laminating Machine Market, Segmentation by Thin-wafer Thickness Class:

Above 100 μ m Thin-wafer Processing

50 μ 100 μ m Thin-wafer Processing

30 μ 50 μ m Ultra-thin Wafer Processing

Below 30 μ m Extreme-thin Wafer Processing

Global Wafer Thinning & Laminating Machine Market, Segmentation by Application:

Advanced Packaging for Logic and AI Chips

Memory and HBM Packaging

SiP and Fan-out Packaging

Power Devices and Thin Power Wafers

OSAT General Thin-wafer Processing

Companies Profiled:

DISCO Corporation

Tokyo Seimitsu Co., Ltd.

Hwatsing Technology Co., Ltd.

Leadlap Semiconductor Equipment

Nitto Denko Corporation

LINTEC Corporation

Key Questions Answered:

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

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