

Semiconductor Manufacturing Equipment Market Report by Equipment Type (Front-End, Back-End), Front-End Equipment (Lithography, Deposition, Cleaning, Wafer Surface Conditioning, and Others), Back-End Equipment (Testing, Assembly and Packaging, Dicing, Bonding, Metrology, and Others), Fab Facility (Automation, Chemical Control, Gas Control, and Others), Product Type (Memory, Logic Components, Microprocessor, Analog Components, Optoelectronic Components, Discrete Components, and Others), Dimension (2D, 2.5D, 3D), Supply Chain Participant (IDM Firms, OSAT Companies, Foundries), and Region 2024-2032

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Abstracts

The global semiconductor manufacturing equipment market size reached US\$ 99.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 211.1 Billion by 2032, exhibiting a growth rate (CAGR) of 8.5% during 2024-2032. The market is driven by technological advancements, rising demand for electric vehicles and renewable energy, global supply chain shifts, the expansion of advanced packaging technologies, and increased investment in research and development.

Semiconductor Manufacturing Equipment Market Trends:

Technological Advancements in Semiconductor Manufacturing:

As the demand for smaller, more efficient, and powerful electronic devices grows, manufacturers are compelled to invest in advanced equipment capable of producing intricate semiconductor components. This shift is fueled by the increasing adoption of Internet of Things (IoT) devices, AI, and 5G technology, which require sophisticated semiconductor chips. Additionally, developments in photolithography, etching, ion implantation, and deposition techniques have made semiconductor manufacturing more precise and cost-effective, encouraging further investment in the sector. This trend is crucial for industries such as consumer electronics, automotive, and healthcare, which are increasingly reliant on advanced semiconductor technology, thus propelling the growth of the semiconductor manufacturing equipment market.

Rising Demand for Electric Vehicles (EVs) and Renewable Energy Systems:

EVs rely heavily on power semiconductors for efficient power management and battery performance. As global efforts to reduce carbon emissions intensify, there is a growing shift towards electric vehicles, which necessitates high-quality semiconductors. Similarly, renewable energy systems such as solar panels and wind turbines require semiconductor components for power conversion and storage. This rising demand for semiconductors in the green energy sector has led to increased investment in semiconductor manufacturing equipment, as manufacturers aim to meet the growing needs for high-performance, reliable, and energy-efficient semiconductors.

Global Supply Chain Reconfiguration and Regional Market Growth:

The reconfiguration of global supply chains in response to geopolitical tensions and trade disputes has emerged as a significant driver for the semiconductor manufacturing equipment market. Countries are increasingly focusing on developing self-reliant semiconductor supply chains to ensure national security and economic stability. This shift has led to increased investment in local semiconductor manufacturing capabilities, particularly in regions such as Europe and Southeast Asia. Additionally, governments are offering incentives and subsidies to support the development of domestic semiconductor industries. This trend towards regionalization and diversification of semiconductor manufacturing is driving demand for a wide range of manufacturing equipment, thereby fueling market growth.

Semiconductor Manufacturing Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on equipment type, front-end equipment, back-end

equipment, fab facility, product type, dimension, and supply chain participant.

Breakup by Equipment Type:

Front-End

Back-End

Front End accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the equipment type. This includes front-end and back-end. According to the report, front end represented the largest segment.

Breakup by Front-End Equipment:

Lithography

Deposition

Cleaning

Wafer Surface Conditioning

Others

Lithography holds the largest share in the industry

A detailed breakup and analysis of the market based on the front-end equipment have also been provided in the report. This includes lithography, deposition, cleaning, wafer surface conditioning, and others. According to the report, lithography accounted for the largest market share.

Breakup by Back-End Equipment:

Testing

Assembly and Packaging

Dicing

Bonding

Metrology

Others

Testing represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the back-end equipment. This includes testing, assembly and packaging, dicing, bonding, metrology, and others. According to the report, testing represented the largest segment.

Breakup by Fab Facility:

- Automation
- Chemical Control
- Gas Control
- Others

Automation exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the fab facility have also been provided in the report. This includes automation, chemical control, gas control, and others. According to the report, automation accounted for the largest market share.

Breakup by Product Type:

- Memory
- Logic Components
- Microprocessor
- Analog Components
- Optoelectronic Components
- Discrete Components
- Others

Memory dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes memory, logic components, microprocessor, analog components, optoelectronic components, discrete components, others. According to the report, memory represented the largest segment.

Breakup by Dimension:

- 2D
- 2.5D
- 3D

2.5D is the predominant market segment

A detailed breakup and analysis of the market based on the dimension have also been provided in the report. This includes 2D, 2.5D, and 3D. According to the report, 2.5D accounted for the largest market share.

Breakup by Supply Chain Participant:

IDM Firms
OSAT Companies
Foundries

IDM firms is the predominant market segment

A detailed breakup and analysis of the market based on the supply chain participant have also been provided in the report. This includes IDM firms, OSAT companies, and foundries. According to the report, IDM firms accounted for the largest market share.

Breakup by Region:

Asia Pacific
Taiwan
China
South Korea
Japan
Singapore
India
Others
North America
United States
Canada
Europe
Germany
United Kingdom
France
Italy
Russia
Spain
Others

Latin America

Mexico

Brazil

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest semiconductor manufacturing equipment market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific (Taiwan, China, Japan, India, South Korea, Singapore and others), North America (the United States and Canada), Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others), Latin America (Brazil, Mexico, and others), and Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Advantest Corporation

Applied Materials Inc.

ASML Holdings N.V.

KLA Corporation

Lam Research Corporation

Onto Innovation Inc.

Plasma-Therm LLC

SCREEN Holdings Co. Ltd.

Teradyne Inc.

Tokyo Electron Limited

Toshiba Corporation

Key Questions Answered in This Report

1. What was the size of the global semiconductor manufacturing equipment market in 2023?
2. What is the expected growth rate of the global semiconductor manufacturing equipment market during 2024-2032?
3. What are the key factors driving the global semiconductor manufacturing equipment

market?

4. What has been the impact of COVID-19 on the global semiconductor manufacturing equipment market?
5. What is the breakup of the global semiconductor manufacturing equipment market based on the equipment type?
6. What is the breakup of the global semiconductor manufacturing equipment market based on the front-end equipment?
7. What is the breakup of the global semiconductor manufacturing equipment market based on the back-end equipment?
8. What is the breakup of the global semiconductor manufacturing equipment market based on the fab facility?
9. What is the breakup of the global semiconductor manufacturing equipment market based on the product type?
10. What is the breakup of the global semiconductor manufacturing equipment market based on the dimension?
11. What is the breakup of the global semiconductor manufacturing equipment market based on the supply chain participant?
12. What are the key regions in the global semiconductor manufacturing equipment market?
13. Who are the key players/companies in the global semiconductor manufacturing equipment market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL SEMICONDUCTOR MANUFACTURING EQUIPMENT MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY EQUIPMENT TYPE

- 6.1 Front-End Equipment
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Back-End Equipment
 - 6.2.1 Market Trends

6.2.2 Market Forecast

7 FRONT-END EQUIPMENT MARKET BREAKUP BY TYPE

7.1 Lithography

7.1.1 Market Trends

7.1.2 Market Forecast

7.2 Deposition

7.2.1 Market Trends

7.2.2 Market Forecast

7.3 Cleaning

7.3.1 Market Trends

7.3.2 Market Forecast

7.4 Wafer Surface Conditioning

7.4.1 Market Trends

7.4.2 Market Forecast

7.5 Others

7.5.1 Market Trends

7.5.2 Market Forecast

8 BACK-END EQUIPMENT MARKET BREAKUP BY TYPE

8.1 Testing

8.1.1 Market Trends

8.1.2 Market Forecast

8.2 Assembly and Packaging

8.2.1 Market Trends

8.2.2 Market Forecast

8.3 Dicing

8.3.1 Market Trends

8.3.2 Market Forecast

8.4 Bonding

8.4.1 Market Trends

8.4.2 Market Forecast

8.5 Metrology

8.5.1 Market Trends

8.5.2 Market Forecast

8.6 Others

8.6.1 Market Trends

8.6.2 Market Forecast

9 MARKET BREAKUP BY FAB FACILITY

9.1 Automation

9.1.1 Market Trends

9.1.2 Market Forecast

9.2 Chemical Control

9.2.1 Market Trends

9.2.2 Market Forecast

9.3 Gas Control

9.3.1 Market Trends

9.3.2 Market Forecast

9.4 Others

9.4.1 Market Trends

9.4.2 Market Forecast

10 MARKET BREAKUP BY PRODUCT TYPE

10.1 Memory

10.1.1 Market Trends

10.1.2 Market Forecast

10.2 Logic Components

10.2.1 Market Trends

10.2.2 Market Forecast

10.3 Microprocessor

10.3.1 Market Trends

10.3.2 Market Forecast

10.4 Analog Components

10.4.1 Market Trends

10.4.2 Market Forecast

10.5 Optoelectronic Components

10.5.1 Market Trends

10.5.2 Market Forecast

10.6 Discrete Components

10.6.1 Market Trends

10.6.2 Market Forecast

10.7 Others

10.7.1 Market Trends

10.7.2 Market Forecast

11 MARKET BREAKUP BY DIMENSION

11.1 2D

11.1.1 Market Trends

11.1.2 Market Forecast

11.2 2.5D

11.2.1 Market Trends

11.2.2 Market Forecast

11.3 3D

11.3.1 Market Trends

11.3.2 Market Forecast

12 MARKET BREAKUP BY SUPPLY CHAIN PARTICIPANT

12.1 IDM Firms

12.1.1 Market Trends

12.1.2 Market Forecast

12.2 OSAT Companies

12.2.1 Market Trends

12.2.2 Market Forecast

12.3 Foundries

12.3.1 Market Trends

12.3.2 Market Forecast

13 MARKET BREAKUP BY REGION

13.1 Asia Pacific

13.1.1 Taiwan

13.1.1.1 Market Trends

13.1.1.2 Market Forecast

13.1.2 China

13.1.2.1 Market Trends

13.1.2.2 Market Forecast

13.1.3 South Korea

13.1.3.1 Market Trends

13.1.3.2 Market Forecast

13.1.4 Japan

- 13.1.4.1 Market Trends
- 13.1.4.2 Market Forecast
- 13.1.5 Singapore
 - 13.1.5.1 Market Trends
 - 13.1.5.2 Market Forecast
- 13.1.6 India
 - 13.1.6.1 Market Trends
 - 13.1.6.2 Market Forecast
- 13.1.7 Others
 - 13.1.7.1 Market Trends
 - 13.1.7.2 Market Forecast
- 13.2 North America
 - 13.2.1 United States
 - 13.2.1.1 Market Trends
 - 13.2.1.2 Market Forecast
 - 13.2.2 Canada
 - 13.2.2.1 Market Trends
 - 13.2.2.2 Market Forecast
- 13.3 Europe
 - 13.3.1 Germany
 - 13.3.1.1 Market Trends
 - 13.3.1.2 Market Forecast
 - 13.3.2 United Kingdom
 - 13.3.2.1 Market Trends
 - 13.3.2.2 Market Forecast
 - 13.3.3 France
 - 13.3.3.1 Market Trends
 - 13.3.3.2 Market Forecast
 - 13.3.4 Italy
 - 13.3.4.1 Market Trends
 - 13.3.4.2 Market Forecast
 - 13.3.5 Russia
 - 13.3.5.1 Market Trends
 - 13.3.5.2 Market Forecast
 - 13.3.6 Spain
 - 13.3.6.1 Market Trends
 - 13.3.6.2 Market Forecast
 - 13.3.7 Others
 - 13.3.7.1 Market Trends

13.3.7.2 Market Forecast

13.4 Latin America

13.4.1 Mexico

13.4.1.1 Market Trends

13.4.1.2 Market Forecast

13.4.2 Brazil

13.4.2.1 Market Trends

13.4.2.2 Market Forecast

13.4.3 Others

13.4.3.1 Market Trends

13.4.3.2 Market Forecast

13.5 Middle East and Africa

13.5.1 Market Trends

13.5.2 Market Breakup by Country

13.5.3 Market Forecast

14 SWOT ANALYSIS

14.1 Overview

14.2 Strengths

14.3 Weaknesses

14.4 Opportunities

14.5 Threats

15 VALUE CHAIN ANALYSIS

16 PORTERS FIVE FORCES ANALYSIS

16.1 Overview

16.2 Bargaining Power of Buyers

16.3 Bargaining Power of Suppliers

16.4 Degree of Competition

16.5 Threat of New Entrants

16.6 Threat of Substitutes

17 PRICE ANALYSIS

18 COMPETITIVE LANDSCAPE

18.1 Market Structure

18.2 Key Players

18.3 Profiles of Key Players

18.3.1 Advantest Corporation

18.3.1.1 Company Overview

18.3.1.2 Product Portfolio

18.3.1.3 Financials

18.3.1.4 SWOT Analysis

18.3.2 Applied Materials Inc.

18.3.2.1 Company Overview

18.3.2.2 Product Portfolio

18.3.2.3 Financials

18.3.2.4 SWOT Analysis

18.3.3 ASML Holdings N.V.

18.3.3.1 Company Overview

18.3.3.2 Product Portfolio

18.3.3.3 Financials

18.3.3.4 SWOT Analysis

18.3.4 KLA Corporation

18.3.4.1 Company Overview

18.3.4.2 Product Portfolio

18.3.4.3 Financials

18.3.4.4 SWOT Analysis

18.3.5 Lam Research Corporation

18.3.5.1 Company Overview

18.3.5.2 Product Portfolio

18.3.5.3 Financials

18.3.5.4 SWOT Analysis

18.3.6 Onto Innovation Inc.

18.3.6.1 Company Overview

18.3.6.2 Product Portfolio

18.3.6.3 Financials

18.3.7 Plasma-Therm LLC

18.3.7.1 Company Overview

18.3.7.2 Product Portfolio

18.3.8 SCREEN Holdings Co. Ltd.

18.3.8.1 Company Overview

- 18.3.8.2 Product Portfolio
- 18.3.8.3 Financials
- 18.3.8.4 SWOT Analysis
- 18.3.9 Teradyne Inc.
 - 18.3.9.1 Company Overview
 - 18.3.9.2 Product Portfolio
 - 18.3.9.3 Financials
 - 18.3.9.4 SWOT Analysis
- 18.3.10 Tokyo Electron Limited
 - 18.3.10.1 Company Overview
 - 18.3.10.2 Product Portfolio
 - 18.3.10.3 Financials
 - 18.3.10.4 SWOT Analysis
- 18.3.11 Toshiba Corporation
 - 18.3.11.1 Company Overview
 - 18.3.11.2 Product Portfolio
 - 18.3.11.3 Financials
 - 18.3.11.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Semiconductor Manufacturing Equipment Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Semiconductor Manufacturing Equipment Market: Breakup by Equipment Type (in Billion US\$), 2018 & 2023

Table 3: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Equipment Type (in Billion US\$), 2024-2032

Table 4: Global: Front-End Equipment Semiconductor Manufacturing Equipment Market: Breakup by Type (in Billion US\$), 2018 & 2023

Table 5: Global: Front-End Equipment Semiconductor Manufacturing Equipment Market Forecast: Breakup by Type (in Billion US\$), 2024-2032

Table 6: Global: Back-End Equipment Semiconductor Manufacturing Equipment Market: Breakup by Type (in Billion US\$), 2018 & 2023

Table 7: Global: Back-End Equipment Semiconductor Manufacturing Equipment Market Forecast: Breakup by Type (in Billion US\$), 2024-2032

Table 8: Global: Semiconductor Manufacturing Equipment Market: Breakup by Fab Facility (in Billion US\$), 2018 & 2023

Table 9: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Fab Facility (in Billion US\$), 2024-2032

Table 10: Global: Semiconductor Manufacturing Equipment Market: Breakup by Product Type (in Billion US\$), 2018 & 2023

Table 11: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Product Type (in Billion US\$), 2024-2032

Table 12: Global: Semiconductor Manufacturing Equipment Market: Breakup by Dimension (in Billion US\$), 2018 & 2023

Table 13: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Dimension (in Billion US\$), 2024-2032

Table 14: Global: Semiconductor Manufacturing Equipment Market: Breakup by Supply Chain Participant (in Billion US\$), 2018 & 2023

Table 15: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Supply Chain Participant (in Billion US\$), 2024-2032

Table 16: Global: Semiconductor Manufacturing Equipment Market: Breakup by Region (in Billion US\$), 2018 & 2023

Table 17: Global: Semiconductor Manufacturing Equipment Market Forecast: Breakup by Region (in Billion US\$), 2024-2032

Table 18: Global: Semiconductor Manufacturing Equipment Price Indicators

Table 19: Global: Semiconductor Manufacturing Equipment Market: Competitive Structure

Table 20: Global: Semiconductor Manufacturing Equipment Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Semiconductor Manufacturing Equipment Market: Major Drivers and Challenges

Figure 2: Global: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Semiconductor Manufacturing Equipment Market: Breakup by Equipment Type (in %), 2023

Figure 5: Global: Semiconductor Manufacturing Equipment (Front-End Equipment) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 6: Global: Semiconductor Manufacturing Equipment (Front-End Equipment) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 7: Global: Semiconductor Manufacturing Equipment (Back-End Equipment) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 8: Global: Semiconductor Manufacturing Equipment (Back-End Equipment) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 9: Global: Front-End Equipment Semiconductor Manufacturing Equipment Market: Breakup by Type (in %), 2023

Figure 10: Global: Semiconductor Manufacturing Equipment (Lithography) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 11: Global: Semiconductor Manufacturing Equipment (Lithography) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 12: Global: Semiconductor Manufacturing Equipment (Deposition) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 13: Global: Semiconductor Manufacturing Equipment (Deposition) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 14: Global: Semiconductor Manufacturing Equipment (Cleaning) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 15: Global: Semiconductor Manufacturing Equipment (Cleaning) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 16: Global: Semiconductor Manufacturing Equipment (Wafer Surface Conditioning) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 17 Global: Semiconductor Manufacturing Equipment (Wafer Surface Conditioning) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 18: Global: Semiconductor Manufacturing Equipment (Other Front-End

Equipments) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 19: Global: Semiconductor Manufacturing Equipment (Other Front-End Equipments) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 20: Global: Back-End Equipment Semiconductor Manufacturing Equipment Market: Breakup by Type (in %), 2023

Figure 21: Global: Semiconductor Manufacturing Equipment (Testing) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 22: Global: Semiconductor Manufacturing Equipment (Testing) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 23: Global: Semiconductor Manufacturing Equipment (Assembly and Packaging) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 24: Global: Semiconductor Manufacturing Equipment (Assembly and Packaging) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 25: Global: Semiconductor Manufacturing Equipment (Dicing) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 26: Global: Semiconductor Manufacturing Equipment (Dicing) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 27: Global: Semiconductor Manufacturing Equipment (Bonding) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 28: Global: Semiconductor Manufacturing Equipment (Bonding) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 29: Global: Semiconductor Manufacturing Equipment (Metrology) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 30: Global: Semiconductor Manufacturing Equipment (Metrology) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 31: Global: Semiconductor Manufacturing Equipment (Other Back-End Equipments) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 32: Global: Semiconductor Manufacturing Equipment (Other Back-End Equipments) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 33: Global: Semiconductor Manufacturing Equipment Market: Breakup by Fab Facility (in %), 2023

Figure 34: Global: Semiconductor Manufacturing Equipment (Automation) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 35: Global: Semiconductor Manufacturing Equipment (Automation) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 36: Global: Semiconductor Manufacturing Equipment (Chemical Control) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 37: Global: Semiconductor Manufacturing Equipment (Chemical Control) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 38: Global: Semiconductor Manufacturing Equipment (Gas Control) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 39: Global: Semiconductor Manufacturing Equipment (Gas Control) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 40: Global: Semiconductor Manufacturing Equipment (Other Fab Facilities) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 41: Global: Semiconductor Manufacturing Equipment (Other Fab Facilities) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 42: Global: Semiconductor Manufacturing Equipment Market: Breakup by Product Type (in %), 2023

Figure 43: Global: Semiconductor Manufacturing Equipment (Memory) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 44: Global: Semiconductor Manufacturing Equipment (Memory) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 45: Global: Semiconductor Manufacturing Equipment (Logic Components) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 46: Global: Semiconductor Manufacturing Equipment (Logic Components) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 47: Global: Semiconductor Manufacturing Equipment (Microprocessor) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 48: Global: Semiconductor Manufacturing Equipment (Microprocessor) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 49: Global: Semiconductor Manufacturing Equipment (Analog Components) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 50: Global: Semiconductor Manufacturing Equipment (Analog Components) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 51: Global: Semiconductor Manufacturing Equipment (Optoelectronic Components) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 52: Global: Semiconductor Manufacturing Equipment (Optoelectronic Components) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 53: Global: Semiconductor Manufacturing Equipment (Discrete Components) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 54: Global: Semiconductor Manufacturing Equipment (Discrete Components) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 55: Global: Semiconductor Manufacturing Equipment (Other Product Types) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 56: Global: Semiconductor Manufacturing Equipment (Other Product Types) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 57: Global: Semiconductor Manufacturing Equipment Market: Breakup by

Dimension (in %), 2023

Figure 58: Global: Semiconductor Manufacturing Equipment (2.5D) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 59: Global: Semiconductor Manufacturing Equipment (2.5D) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 60: Global: Semiconductor Manufacturing Equipment (2D) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 61: Global: Semiconductor Manufacturing Equipment (2D) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 62: Global: Semiconductor Manufacturing Equipment (3D) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 63: Global: Semiconductor Manufacturing Equipment (3D) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 64: Global: Semiconductor Manufacturing Equipment Market: Breakup by Supply Chain Participant (in %), 2023

Figure 65: Global: Semiconductor Manufacturing Equipment (IDM Firms) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 66: Global: Semiconductor Manufacturing Equipment (IDM Firms) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 67: Global: Semiconductor Manufacturing Equipment (OSAT Companies) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 68: Global: Semiconductor Manufacturing Equipment (OSAT Companies) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 69: Global: Semiconductor Manufacturing Equipment (Foundries) Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 70: Global: Semiconductor Manufacturing Equipment (Foundries) Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 71: Global: Semiconductor Manufacturing Equipment Market: Breakup by Region (in %), 2023

Figure 72: Asia Pacific: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 73: Asia Pacific: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 74: Asia Pacific: Semiconductor Manufacturing Equipment Market: Breakup by Country (in %), 2023

Figure 75: Taiwan: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 76: Taiwan: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 77: China: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 78: China: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 79: South Korea: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 80: South Korea: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 81: Japan: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 82: Japan: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 83: Singapore: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 84: Singapore: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 85: India: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 86: India: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 87: Others: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 88: Others: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 89: North America: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 90: North America: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 91: North America: Semiconductor Manufacturing Equipment Market: Breakup by Country (in %), 2023

Figure 92: United States: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 93: United States: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 94: Canada: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 95: Canada: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 96: Europe: Semiconductor Manufacturing Equipment Market: Sales Value (in

Billion US\$), 2018 & 2023

Figure 97: Europe: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 98: Europe: Semiconductor Manufacturing Equipment Market: Breakup by Country (in %), 2023

Figure 99: Germany: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 100: Germany: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 101: United Kingdom: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 102 United Kingdom: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 103: France: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 104: France: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 105: Italy: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 106: Italy: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 107: Russia: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 108: Russia: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 109: Spain: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 110: Spain: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 111: Others: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 112: Others: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 113: Latin America: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 114: Latin America: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 115: Latin America: Semiconductor Manufacturing Equipment Market: Breakup by Country (in %), 2023

Figure 116: Mexico: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 117: Mexico: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 118: Brazil: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 119: Brazil: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 120: Others: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 121: Others: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 122: Middle East and Africa: Semiconductor Manufacturing Equipment Market: Sales Value (in Billion US\$), 2018 & 2023

Figure 123: Middle East and Africa: Semiconductor Manufacturing Equipment Market: Breakup by Country (in %), 2023

Figure 124: Middle East and Africa: Semiconductor Manufacturing Equipment Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 125: Global: Semiconductor Manufacturing Equipment Industry: SWOT Analysis

Figure 126: Global: Semiconductor Manufacturing Equipment Industry: Value Chain Analysis

Figure 127: Global: Semiconductor Manufacturing Equipment Industry: Porter's Five Forces Analysis

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