

Global 2.5D and 3D TSV Market Growth (Status and Outlook) 2025-2031

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Abstracts

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The global 2.5D and 3D TSV market size is predicted to grow from US\$ 11560 million in 2025 to US\$ 24560 million in 2031; it is expected to grow at a CAGR of 13.4% from 2025 to 2031.

2.5D and 3D packaging are inseparable from TSV technology, and the integration of 2.D and 3D must be achieved through TSV.

Specifically, 2.5D packaging technology uses a silicon interposer to lay out multiple chips or dies side by side with components such as high-bandwidth memory, and uses micro-bumps or micro-bumps on the interposer as efficient interconnection bridges, significantly enhancing Improves data transfer rate and overall system performance. The core of 3D packaging technology is to use TSV technology to realize vertical stacking and interconnection of chips. This innovation not only greatly reduces the chip size, improves the integration density and performance, but also effectively reduces power consumption and heat dissipation requirements, further enhancing The reliability and stability of the system.

The downstream of 2.D and 3D TSV packaging is mainly used in HPC, AR/VR, games, network switches and routers, MEMS, CIS and LED, etc. As early as 2007, Intel took the lead in introducing 2.5D packaging technology, the core concept of which is to use silicon interposers to achieve high-density interconnection between chips. Since then, TSMC, Samsung and other companies have actively participated in research and development, and jointly promoted the increasing maturity of 2.5D packaging technology. At the same time, 3D packaging technology began to emerge in the early

21st century. The key lies in the use of TSV technology to achieve vertical stacking connection of chips. In the 2010s, with the significant progress of TSV technology, 3D packaging technology was first applied in the memory field, and gradually penetrated into multiple fields such as logic chips and RF chips. In recent years, 2.5D and 3D TSV packaging technologies have gradually penetrated into the fields of artificial intelligence and 5G communications. In the future, these two fields will become the main driving force for the growth of this market.

The manufacturing process of 2.5D and 3D TSV packaging includes wafer manufacturing, which involves multiple process steps such as lithography, etching, ion implantation, and thin film deposition. Each step requires special equipment, such as TSV etching equipment and TSV deposition equipment. In this field, the core companies mainly include Applied Materials, Lam Research, TEL, Samco Inc, ULVAC, and North China Huachuang. From the perspective of market competition, Japanese and American companies have a greater competitive advantage in the TSV packaging equipment market.

In the 2.5D and 3D TSV packaging market, there are mainly IDM and packaging and testing companies. Among them, the leading representative company TSMC has rich production experience in the 2.5D and 3D packaging market. Its 2.5D/3D packaging technologies are CoWoS and SoIC respectively.

In terms of regional markets, mainland China accounts for about 23% of the 2.5D and 3D TSV packaging market. As the leader in the consumer electronics market, mainland China has shown a huge demand for high-performance and low-power semiconductor chips. This situation has greatly promoted the market application potential of 2.5D and 3D packaging technologies. At the same time, the Chinese government actively supports the semiconductor industry and implements a series of incentive policies to stimulate the R&D vitality of enterprises and promote technological innovation. In the field of semiconductor manufacturing, China has made great progress. The continuous enhancement of wafer manufacturing capabilities has provided strong support for the vigorous development of the packaging industry. It is expected that by 2030, the Chinese mainland market share will reach 25%.

LPI (LP Information)' newest research report, the "2.5D and 3D TSV Industry Forecast" looks at past sales and reviews total world 2.5D and 3D TSV sales in 2024, providing a comprehensive analysis by region and market sector of projected 2.5D and 3D TSV sales for 2025 through 2031. With 2.5D and 3D TSV sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of

the world 2.5D and 3D TSV industry.

This Insight Report provides a comprehensive analysis of the global 2.5D and 3D TSV landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on 2.5D and 3D TSV portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 2.5D and 3D TSV market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 2.5D and 3D TSV and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 2.5D and 3D TSV.

This report presents a comprehensive overview, market shares, and growth opportunities of 2.5D and 3D TSV market by product type, application, key players and key regions and countries.

Segmentation by Type:

2.5D TSV

3D TSV

Segmentation by Application:

Memory

CIS

SoC

MEMS

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

TSMC

Samsung

Intel

ASE Group

Amkor Technology

SPIL

Powertech Technology

JCET Group

GlobalFoundries Inc

Tezzaron Semiconductor

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