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Global Backside Power Delivery Process Equipment Market Growth 2026-2032

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Abstracts

The global Backside Power Delivery Process Equipment market size is predicted to grow from US$ 643 million in 2025 to US$ 2537 million in 2032; it is expected to grow at a CAGR of 16.1% from 2026 to 2032.

Backside power delivery process equipment is a wafer-level process equipment portfolio for advanced logic chip manufacturing. Its core task is to form a stable power delivery network on the backside of the chip after transistor and signal interconnect formation through temporary wafer bonding, backside thinning, backside patterning, dielectric etching, barrier and seed layer deposition, copper or other metal filling, chemical mechanical planarization, wet cleaning, annealing, defect inspection, and metrology control. This equipment category addresses the challenges of conventional frontside power delivery, including routing resource consumption, signal interconnect congestion, voltage drop, and increasing power management complexity. It allows more frontside metal layers to serve signal transmission and provides a manufacturing foundation with higher density, lower resistance, and improved thermal-electrical coordination for high-performance computing, artificial intelligence processors, advanced mobile processors, and next-generation foundry logic nodes.

The industrial value of backside power delivery process equipment comes from a fundamental change in the power delivery architecture of advanced logic chips. As transistor density increases, frontside metal layers must support both signal interconnects and power delivery networks, leading to greater routing congestion, voltage drop, parasitic effects, and power management complexity. By moving part of the power delivery network to the wafer backside, more frontside metal resources can be allocated to high-speed signal interconnects, creating a new optimization space among chip area, power consumption, and performance. Therefore, this equipment

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category is not a single new tool in the traditional sense, but a structural source of incremental demand within advanced-node manufacturing systems. It will drive demand across wafer support, thinning, etching, deposition, electroplating, planarization, cleaning, and inspection and metrology equipment, while also pushing equipment suppliers from standalone tool delivery toward process coordination and line-level qualification. As advanced logic nodes continue to ramp for artificial intelligence, high-performance computing, and mobile processors, equipment demand for backside power delivery is expected to move gradually from R&D lines and pilot lines into mass-production configurations, creating capital expenditure opportunities over multiple years.

From a process difficulty perspective, backside power delivery imposes higher requirements on equipment stability, cross-process matching, and process control. After frontside structures are completed, wafers need to undergo temporary bonding and backside thinning, and any warpage, breakage, adhesive residue, or thickness non-uniformity may affect subsequent backside opening and metal interconnect quality. Backside etching must achieve controlled openings in complex structures, thin-film deposition must ensure consistent coverage of barrier layers, dielectric layers, and seed layers, electrochemical deposition must deliver metal fill with low defects, low resistance, and high uniformity, while CMP and cleaning must remove excess material while controlling scratches, particles, and residues. Because these steps are highly coupled, tool selection will place greater emphasis on process windows, inline metrology, defect tracking, and yield feedback loops. Suppliers with multi-process platforms, core chamber technologies, chemical process understanding, and joint qualification capabilities with customers will be better positioned to enter mass-production supply chains, while single-tool performance alone will not be sufficient to support customer decisions.

From a competitive landscape perspective, backside power delivery process equipment will continue to show both global specialization and regional reinforcement. Suppliers in the United States, Japan, Europe, and South Korea have long accumulated strengths in lithography, etching, deposition, thinning, cleaning, CMP, bonding, and inspection and metrology, making them important sources of supply when advanced logic customers introduce new processes. At the same time, equipment companies in mainland China have built product portfolios in etching, deposition, cleaning, electroplating, CMP, coater and developer, and wet processing tools. As local wafer fabs raise their requirements for complete advanced process chains, related domestic equipment may gain more opportunities in qualification lines and selected mass-production steps. Future industry growth will come not only from an increase in tool shipments, but also from greater process complexity, including more chambers, more metrology stations, more cleaning

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steps, stronger software control, and expanded maintenance services. Overall, this field is a long-term incremental market driven by the upgrade of advanced logic manufacturing, with competition focused on yield, supply security, process qualification speed, and customer collaboration capability.

LP Information, Inc. (LPI) ' newest research report, the “Backside Power Delivery Process Equipment Industry Forecast” looks at past sales and reviews total world Backside Power Delivery Process Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Backside Power Delivery Process Equipment sales for 2026 through 2032. With Backside Power Delivery Process Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Backside Power Delivery Process Equipment industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Backside Power Delivery Process Equipment and breaks down the forecast by Pattern Formation Method, 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 Backside Power Delivery Process Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Backside Power Delivery Process Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Pattern Formation Method:

Lithographic Pattern Formation

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Plasma Etch Pattern Formation

Wet Etch Pattern Formation

Segmentation by Removal Target:

Particle Removal

Organic Residue Removal

Metal Residue Removal

Dielectric Residue Removal

Edge Film Removal

Segmentation by Process Stage:

Carrier Wafer Support

Wafer Thinning

Backside Opening

Insulation and Barrier Formation

Metal Interconnect Formation

Surface Preparation

Inspection and Metrology

Segmentation by Application:

Advanced Logic Backside Power Delivery

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Thin Wafer Processing

Backside Opening Formation

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

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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 analysing the company's coverage, product portfolio, its market penetration.

Applied Materials, Inc.

Lam Research Corporation

KLA Corporation

ASML Holding N.V.

EV Group

SUSS MicroTec SE

ASM International N.V.

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DISCO Corporation

Tokyo Electron Limited

SCREEN Holdings Co., Ltd.

EBARA Corporation

Canon Inc.

Nikon Corporation

SEMES Co., Ltd.

Jusung Engineering Co., Ltd.

PSK Inc.

NAURA Technology Group Co., Ltd.

Advanced Micro-Fabrication Equipment Inc. China

ACM Research (Shanghai), Inc.

Hwatsing Technology Co., Ltd.

Piotech Inc.

KINGSEMI Co., Ltd.

Onto Innovation Inc.

Nova Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Backside Power Delivery Process

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Equipment market?

What factors are driving Backside Power Delivery Process Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Backside Power Delivery Process Equipment market opportunities vary by end market size?

How does Backside Power Delivery Process Equipment break out by Pattern Formation Method, by Application?

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