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Global Compound Semiconductor Thinning Equipment Market Growth 2026-2032

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Abstracts

The global Compound Semiconductor Thinning Equipment market size is predicted to grow from US$ 319 million in 2025 to US$ 615 million in 2032; it is expected to grow at a CAGR of 9.5% from 2026 to 2032.

Compound Semiconductor Thinning Equipment refers to precision semiconductor manufacturing systems used to reduce wafer or substrate thickness, remove backside material, control thickness uniformity and flatness, and limit processing-induced surface or subsurface damage for compound semiconductor materials such as silicon carbide (SiC), gallium nitride (GaN), gallium arsenide (GaAs), indium phosphide (InP), and other compound semiconductor wafers. The market primarily covers wafer back grinders, precision lapping systems, high-rigidity grinders for hard and brittle materials, and grinding-polishing integrated equipment in which thickness reduction is a core process function. Typical systems combine precision spindles, diamond grinding wheels or abrasive plates, wafer chuck tables, high-resolution feed mechanisms, cleaning and handling modules, and process-control software. Critical equipment and process parameters include supported wafer diameter, final wafer thickness, total thickness variation (TTV), local thickness variation, surface roughness, bow and warp, subsurface damage, wafer breakage rate, throughput, and abrasive-tool life. The research scope focuses on Compound Semiconductor Thinning Equipment used in compound semiconductor substrate preparation, backside processing of device wafers, pre-dicing thinning, and related precision thickness-control processes.

Key Findings

SiC contributes roughly 65%–75% of narrow-scope market demand

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Back grinding remains the principal product form while 200 mm compatibility drives equipment upgrades

Japan leads mature high-volume grinding capability while China has the broadest emerging OEM pool

Market Trends

Compound Semiconductor Thinning Equipment is moving from conventional material-removal capability toward higher precision, lower damage, larger wafer diameter and greater process integration. The most important product transition is the migration of SiC manufacturing from 150 mm toward 200 mm, which increases requirements for spindle rigidity, thermal stability, wafer-shape compensation, automated handling, in-process thickness control and breakage prevention. Fully automatic dual-spindle architectures that combine coarse and fine grinding are becoming more relevant for volume production, while hydrostatic structures, ultrasonic-assisted grinding and integrated grinding-polishing approaches are being introduced to reduce subsurface damage and downstream polishing load. Demand for higher automation is also increasing as expensive compound semiconductor wafers place greater economic value on repeatability and yield rather than on removal rate alone. The industrial transition is already visible in 200 mm SiC manufacturing: STMicroelectronics has shifted Catania resources toward 200 mm SiC production, Infineon has released products based on 200 mm SiC technology and is converting Kulim capacity, and Wolfspeed commercially launched its 200 mm SiC materials portfolio in 2025.

Market Dynamics

Drivers

The principal demand driver is continued adoption of wide-bandgap and III-V semiconductors in applications where efficiency, power density, switching frequency, thermal performance or RF characteristics provide meaningful system-level benefits. SiC power devices are increasing their penetration in electric vehicles, charging infrastructure, industrial power conversion, renewable energy systems and high-efficiency power supplies, while GaN, GaAs and InP support additional demand from RF, telecommunications and photonics. Capacity expansion and wafer-diameter migration have a direct impact on Compound Semiconductor Thinning Equipment because every increase in qualified substrate and device manufacturing capacity requires corresponding investment in precision thickness-control processes. Broader

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semiconductor capital expenditure also provides a supportive investment environment; SEMI reported continued expansion in global fab equipment investment, although spending patterns remain differentiated by semiconductor segment and technology.

Restraints

Market expansion is constrained by the relatively small scale of compound semiconductor production compared with mainstream silicon manufacturing, long equipment qualification cycles and the difficulty of achieving stable economics when individual customer projects can be large but irregular. SiC in particular combines very high hardness with brittleness and high wafer value, requiring costly precision spindles, high-rigidity platforms, advanced abrasive systems and sophisticated process control. Equipment that achieves acceptable removal rates but produces excessive subsurface damage can increase downstream polishing requirements and total manufacturing cost, limiting customer adoption. In addition, compound semiconductor capital expenditure is cyclical: temporary wafer or device overcapacity, inventory corrections and slower-than-expected electric-vehicle demand can delay equipment orders even when the long-term technology roadmap remains intact.

Opportunities

The most attractive opportunity is the 200 mm SiC transition, because larger wafers require both replacement of legacy equipment and upgrades in automation, precision and damage control. Equipment vendors also have opportunities to expand from standalone grinding tools toward integrated grinding, cleaning, measurement and polishing solutions that reduce wafer handling and improve process consistency. China presents an additional localization opportunity as domestic equipment manufacturers increasingly participate in SiC substrate and device production lines, while Japanese, European and North American suppliers can defend premium positions through process stability and high-volume installed-base experience. Beyond SiC, specialized thinning solutions for GaAs, GaN and InP remain attractive niche markets where customers place high value on flexibility, low breakage and small-batch process control.

Challenges

The principal challenge is converting technically qualified equipment into repeatable high-volume installations across multiple customers. Compound semiconductor materials, wafer structures and customer recipes vary substantially, making process transfer less standardized than in mature silicon grinding applications. New entrants must demonstrate long-term TTV stability, spindle reliability, abrasive consumption,

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wafer breakage performance and reproducible subsurface-damage control rather than relying only on nominal specifications. Competition is also intensifying as traditional precision-machine-tool manufacturers, established semiconductor equipment suppliers and emerging local OEMs converge on the same SiC opportunities. Over the longer term, continued development of alternative low-damage material-removal techniques and future wafer-diameter transitions could change equipment architecture, creating ongoing R&D requirements and shortening product-upgrade cycles.

Industry Chain Analysis

The Compound Semiconductor Thinning Equipment industry chain begins with high-precision mechanical, abrasive, motion-control and measurement components. Key upstream inputs include high-speed precision spindles, hydrostatic or high-stiffness bearing systems, diamond grinding wheels and related abrasives, ceramic or porous vacuum chucks, servo motors, linear motion components, precision sensors, thickness-measurement modules, cleaning modules and automation components. Equipment performance depends strongly on the integration of these subsystems, particularly because micron-level thickness variation or mechanical vibration can materially affect expensive SiC or III-V wafers. The midstream consists of equipment OEMs responsible for mechanical architecture, wafer handling, spindle and table control, process recipes, software, system integration, application engineering and customer qualification. Value creation is therefore concentrated not only in equipment assembly but also in process know-how and the ability to optimize the interaction between grinding parameters, abrasive selection and downstream surface finishing.

Downstream users include compound semiconductor substrate manufacturers, integrated device manufacturers, foundries and specialized wafer-processing operations. Their purchasing decisions are increasingly based on total cost of ownership rather than equipment price alone. Yield, wafer breakage, consumable life, throughput, maintenance requirements and the amount of subsequent polishing required after grinding can materially change the economics of a production line. This gives established suppliers with proven installed bases an advantage in high-volume manufacturing, while newer suppliers can compete through lower acquisition cost, localized service, customization and joint process development. As 200 mm SiC production scales, the value chain is expected to place greater emphasis on automated wafer handling, process traceability and integration between thinning, cleaning, metrology and polishing.

Segment Insights

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By material, SiC is the dominant segment of Compound Semiconductor Thinning Equipment and is estimated to account for approximately 65%–75% of narrow-scope market demand. Its share reflects both the technical difficulty of processing SiC and the comparatively high level of capacity investment in SiC power semiconductor manufacturing. GaAs, GaN and InP collectively form a smaller but technically important market, with demand distributed across RF, optoelectronics, photonics and specialized power applications. These materials generally support a wider mix of wafer diameters, production scales and equipment configurations, creating opportunities for flexible and semi-automatic systems in addition to high-volume automated platforms.

By product type, wafer back grinding and precision mechanical grinding represent the largest equipment category, while lapping and grinding-polishing integrated systems address substrate preparation and applications requiring additional surface-damage control. By wafer diameter, 150 mm remains important across SiC and several III-V processes, while 200 mm is the principal equipment-upgrade opportunity. The shift toward 200 mm does not simply increase processing area; it raises requirements for mechanical rigidity, uniform chucking, thermal management, TTV control and automated wafer handling. Consequently, 200 mm-compatible equipment is expected to capture a growing proportion of new capital expenditure even while smaller-diameter tools remain relevant for GaAs, InP, R&D and specialty production.

Downstream Market Opportunities

Automotive electrification remains an important demand base for SiC-related Compound Semiconductor Thinning Equipment through traction inverters, onboard chargers, DC-DC converters and charging infrastructure, but the opportunity set is becoming more diversified. Industrial motor drives, renewable energy conversion, energy storage, railway systems and high-efficiency power conversion continue to support SiC demand, while AI data centers are increasing interest in power semiconductor technologies that can improve conversion efficiency and power density. Communications and RF markets support GaN and GaAs processing, while high-speed optical communication, lasers and photonic devices sustain specialized GaAs and InP requirements. This broader application mix reduces dependence on a single end market and creates differentiated equipment opportunities ranging from high-volume automated SiC grinding to flexible precision thinning systems for lower-volume III-V wafers. Wolfspeed’s current materials portfolio links SiC and GaN materials to automotive, industrial, renewable energy, telecom and power-management applications, illustrating the increasing diversity of compound semiconductor demand.

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Regional Insights

Asia-Pacific represents the principal production and equipment-supply cluster for Compound Semiconductor Thinning Equipment. Japan retains the strongest concentration of mature high-volume precision-grinding technology, supported by long-established semiconductor and machine-tool capabilities. China has developed the broadest pool of emerging local OEMs identified in this study, with suppliers moving rapidly into SiC substrate thinning, device-wafer grinding and integrated grinding-polishing systems. Taiwan combines semiconductor manufacturing scale with a strong precision-machine-tool base, creating opportunities for specialized SiC equipment, while South Korea is developing a smaller but increasingly relevant domestic supplier base. Malaysia is becoming more important from the demand side as 200 mm SiC manufacturing capacity expands, including Infineon’s Kulim transition.

North America and Europe have fewer suppliers in absolute number but retain important specialist capabilities. North American companies are particularly relevant in SiC-focused grinding, lapping and surface-processing technology, while European suppliers maintain positions in precision lapping, grinding and specialty wafer-processing systems. Europe is also becoming a more important equipment-demand location through major 200 mm SiC manufacturing investment, including STMicroelectronics’ Catania program, which integrates substrate development, epitaxy, front-end manufacturing and back-end processes. The regional opportunity therefore differs by market: Japan competes primarily through technology and installed base, China through localization and supplier expansion, North America and Europe through specialization and advanced-process capability, and Southeast Asia through new production capacity.

Competitive Landscape Analysis

The competitive landscape of Compound Semiconductor Thinning Equipment is characterized by a relatively concentrated high-end technology tier combined with a much broader group of regional and specialized manufacturers. The verified Core Formal List contains 31 manufacturers after consolidation of controlled subsidiaries into their respective parent companies. Japanese suppliers such as DISCO, TOKYO SEIMITSU, Okamoto and JTEKT hold strong positions in precision grinding, automation, equipment reliability and installed-base experience, while specialized North American and European manufacturers such as Revasum, Lapmaster Wolters, Engis, Logitech and G&N compete through SiC, III-V and precision surface-processing expertise. China has become the largest source of new OEM participation in the supplier pool, with companies including TSD, Maxwell, Jingsheng, CETC Electronics

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Equipment Group, Hwatsing and other domestic manufacturers expanding compound semiconductor thinning capabilities. Taiwan and South Korea add a further layer of regional competition. Competitive differentiation is increasingly shifting from whether a supplier can process SiC to whether it can deliver stable high-volume results in 200 mm production, combining low TTV, low subsurface damage, acceptable abrasive cost, high automation and repeatable throughput. Official products from leading suppliers already demonstrate this direction: DISCO’s DFG8541 supports 200 mm wafers and SiC processing, while Okamoto’s hard-material grinder explicitly targets SiC and compound semiconductors.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Compound Semiconductor Thinning 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 Compound Semiconductor Thinning Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Compound Semiconductor Thinning Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Compound Semiconductor Thinning Equipment 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 Compound Semiconductor Thinning Equipment.

This report presents a comprehensive overview, market shares, and growth

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opportunities of Compound Semiconductor Thinning Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Lapping Machine

Grinding-Polishing Integrated Equipment

Segmentation by Wafer Material:

Silicon Carbide (SiC)

Gallium Nitride (GaN)

Gallium Arsenide (GaAs)

Indium Phosphide (InP)

Other Compound Semiconductors

Segmentation by Wafer Diameter:

?100 mm (?4 inch)

>100–150 mm (>4–6 inch)

>150–200 mm (>6–8 inch)

>200 mm (>8 inch)

Segmentation by Automation Level:

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Manual Equipment

Semi-automatic Equipment

Fully Automatic Equipment

Segmentation by Application:

Automotive & New Energy Vehicles

Communications & Data Centers

Consumer Electronics

Aerospace & Defense

Other Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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

- JTEKT CORPORATION

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DISCO CORPORATION

Shenzhen Everwin Precision Technology Co., Ltd.

Zhejiang Jingsheng Mechanical & Electrical Co., Ltd.

CETC Electronics Equipment Group Co., Ltd.

Suzhou Maxwell Technologies Co., Ltd.

TOKYO SEIMITSU CO., LTD.

Hwatsing Technology Co., Ltd.

Okamoto Machine Tool Works, Ltd.

Hunan Yujing Machinery Co., Ltd.

Tongtai Machine & Tool Co., Ltd.

Beijing TSD Semiconductor Equipment Co., Ltd.

Lapmaster Wolters

Engis Corporation

SpeedFam Co., Ltd.

Revasum, Inc.

Shuwa Industry Co., Ltd.

Shanghai Siplus Semiconductor Co., Ltd.

GMC Semi-tech Co., Ltd.

Shenyang Heyan Technology Co., Ltd.

Xinfeng Precision Technology Co., Ltd.

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Logitech Limited

G&N Genauigkeits Maschinenbau N?rnberg GmbH

GRINTIMATE

INSEMITEC

JOEN LIH MACHINERY CO., LTD.

N-TEC CORP.

CHONGQING JINGFENG SEMICONDUCTOR CO., LTD

Shenzhen Fangda Yanmo Jishu Youxian Gongsi

Shenzhen Bochuangxin Bandaoti Zhuangbei Youxian Gongsi

Zhengzhou Henuo Machinery Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Compound Semiconductor Thinning Equipment market?

What factors are driving Compound Semiconductor Thinning Equipment market growth, globally and by region?

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

How do Compound Semiconductor Thinning Equipment market opportunities vary by end market size?

How does Compound Semiconductor Thinning Equipment break out by Type, by Application?

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