

Global Dicing Blades for Semiconductor Packaging Market Growth 2026-2032

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Abstracts

The global Dicing Blades for Semiconductor Packaging market size is predicted to grow from US\$ 65.54 million in 2025 to US\$ 105 million in 2032; it is expected to grow at a CAGR of 6.8% from 2026 to 2032.

Dicing blades for semiconductor packaging are circular precision tools mounted on high-speed dicing saw spindles to mechanically cut molded semiconductor package strips, assembled substrates, panels, or reconstituted wafers into individual packaged devices. The blades generally consist of diamond abrasives embedded in electroformed nickel, resin, or sintered metal bonds and are mainly supplied as hubless annular blades, hub blades, or steel-core composite blades. The cutting-edge thickness of core commercial products generally ranges from approximately 50 to 750 micrometers. Products between 50 and 300 micrometers are primarily used for precision package singulation, while blades between 300 and 750 micrometers are mainly applied to thicker package materials, deep cutting, and high-load processing.

These blades are primarily used for the singulation of ball grid array packages, land grid array packages, quad-flat no-lead packages, dual-flat no-lead packages, chip-scale packages, system-in-package products, wafer-level packages, light-emitting diode packages, and selected power semiconductor packages. The blades must process combinations of epoxy molding compounds, copper leadframes, package substrates, metal pads, and dielectric materials while maintaining package dimensions, minimizing burrs, chipping, and delamination, and supporting long blade life and high-volume throughput. The category excludes blades used exclusively for bare semiconductor wafer dicing, ingot slicing blades, wafer thinning wheels, general printed circuit board routing blades, and laser or plasma singulation equipment.

In 2025, global production of dicing blades for semiconductor packaging reached approximately 1.05 million to 1.15 million pieces, while the weighted FOB price of mainstream products ranged from approximately USD 58 to USD 64 per piece. Standard electroformed nickel-bond and resin-bond hubless blades were mainly concentrated within this range, while sintered metal blades, steel-core composite blades, and customized products for wettable-flank packages, high-copper-content materials, narrow kerfs, or high-speed deep cutting generally commanded higher unit prices.

Opportunities and Core Market Drivers

The expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, automotive electronics, industrial controls, and power semiconductors is increasing semiconductor package volumes, package complexity, and back-end processing requirements. Advanced packaging is progressively adopting chiplet integration, fan-out packaging, wafer-level packaging, and heterogeneous integration, while conventional packages continue to move toward smaller footprints, reduced thicknesses, higher terminal density, and tighter dimensional tolerances. Singulation processes must therefore cut increasingly complex combinations of molding compounds, copper leadframes, package substrates, and metal pads. Narrower cutting streets, smaller package dimensions, and the growing use of wettable-flank structures are raising requirements for reduced copper burrs, lower resin chipping, limited delamination, and consistent kerf width, supporting demand for high-rigidity sintered blades, precision resin-bond blades, slotted cooling structures, and blades designed for step-cut processes.

Industry Chain and Downstream Demand Trends

The upstream supply chain includes synthetic diamond powders, high-purity nickel and nickel salts, resin systems, metal-bond powders, steel cores, and precision hubs. Midstream manufacturing processes include abrasive classification, electroforming, molding and curing, powder sintering, steel-core construction, precision dressing, dynamic balancing, and qualification with package materials. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, light-emitting diode manufacturers, and power semiconductor packaging companies. Because blade performance directly affects package dimensions, copper burr formation, molding-compound chipping, interfacial delamination, and final electrical reliability, products generally require extended qualification for specific molding compounds, copper thicknesses, substrate structures,

and dicing saw platforms.

Future competition will increasingly focus on cost per cutting length, radial blade wear, replacement frequency, equipment utilization, and total production yield rather than initial unit price alone. Laser and plasma singulation technologies will expand in selected high-density advanced packaging applications. Mechanical dicing blades, however, are expected to retain substantial productivity, equipment compatibility, and cost advantages in ball grid array, quad-flat no-lead, land grid array, power semiconductor, and high-volume mature package singulation.

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

This Insight Report provides a comprehensive analysis of the global Dicing Blades for Semiconductor Packaging 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 Dicing Blades for Semiconductor Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Dicing Blades for Semiconductor Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Dicing Blades for Semiconductor Packaging 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 Dicing Blades for Semiconductor Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Dicing Blades for Semiconductor Packaging market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Resin Bond

Sintered Metal Bond

Electroformed Nickel Bond

Others

Segmentation by End Use Industry:

Consumer Electronics and Computing

Automotive Electronics

Communications Electronics

Others

Segmentation by Blade Structure:

Hubless Annular Blades

Hub Blades

Steel-Core Composite Blades

Segmentation by Blade Thickness:

Below 150 Micrometers

150 to 299 Micrometers

300 to 750 Micrometers

Others

Segmentation by Application:

QFN and DFN Packages

BGA and LGA Packages

Wafer-Level and Fan-Out Packages

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

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Tokyo Seimitsu Co., Ltd.

Kulicke and Soffa Industries, Inc.

Keteca Singapore Pte. Ltd.

Saint-Gobain S.A.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

KINIK COMPANY

NDS TAIWAN CO., LTD.

GL Tech Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

WINTIME Semiconductor Technology Co., Ltd.

Zhengzhou Research Institute for Abrasives and Grinding Co., Ltd.

Nanjing Sanchao Advanced Materials Co., Ltd.

Zhejiang Xiste Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Dicing Blades for Semiconductor Packaging market?

What factors are driving Dicing Blades for Semiconductor Packaging market growth, globally and by region?

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

How do Dicing Blades for Semiconductor Packaging market opportunities vary by end market size?

How does Dicing Blades for Semiconductor Packaging break out by Type, by Application?

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