

Global Fully Automatic Wafer Expander Market Growth 2026-2032

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Abstracts

The global Fully Automatic Wafer Expander market size is predicted to grow from US\$ 80.56 million in 2025 to US\$ 251 million in 2032; it is expected to grow at a CAGR of 19.0% from 2026 to 2032.

In 2025, global sales of fully automatic wafer expanders reached 261 units, with an average price of US\$315,000 per unit.

Fully automatic wafer expanders are crucial back-end equipment used after semiconductor wafer or LED chip dicing (dicing) processes. A servo motor or pneumatically driven stage rises, uniformly stretching the dicing tape attached to the back of the wafer along the X-Y direction. This separates and stretches the diced chips to the target spacing (typically expanding from a close packing to a gap of 200 μ m–1mm or more), thus preventing chip collisions and edge chipping, and facilitating subsequent automatic pick and place and die bonding.

The raw materials for fully automated wafer expander include an aluminum alloy or stainless steel frame (providing high rigidity to withstand expansion tension), a servo motor or precision pneumatic system (driving the table lifting and controlling expansion accuracy to ± 0.1 mm), precision linear guides and bearings (ensuring smooth vertical movement), a heating and temperature control system (heating the worktable to 40-80°C to soften the wafer film, including ceramic heating elements or cast aluminum heating plates), a PLC control system and touch screen (the core of automation control, supporting the storage of multiple process recipes), and precision mechanical components (expanding rings, dicing blades, vacuum chucks, etc., which must match the wafer size); high-end fully automated models also require a vision alignment system (CCD camera) and an automatic loading and unloading robotic arm.

In terms of cost structure, automated wafer expanders exhibit a significant hierarchy in automation levels: precision machining components (racks, guide rails, molds) account for 40-50% of the total cost, electrical control systems (PLC, servo, temperature control) account for 30-35%, and software development and debugging account for 10-15%. For high-end fully automated models, the proportion of costs for vision systems, precision motion control modules, and software algorithms increases to 40-50%, while the proportion of mechanical structure costs decreases relatively. As wafer sizes move towards 12 inches (300mm), the requirements for equipment rigidity, thermal uniformity, and control precision increase non-linearly. Larger-size models cost 50-100% more than smaller-size (6-8 inch) models, and key components (high-precision servo drives, vacuum components) still partially rely on imports, further increasing the manufacturing costs of high-end equipment.

United States market for Fully Automatic Wafer Expander is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Fully Automatic Wafer Expander is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Fully Automatic Wafer Expander is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Fully Automatic Wafer Expander players cover DISCO, Ohmiya Industry, N-TEC Corp., etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global Fully Automatic Wafer Expander 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

Fully Automatic Wafer Expander portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fully Automatic Wafer Expander market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fully Automatic Wafer Expander 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 Fully Automatic Wafer Expander.

This report presents a comprehensive overview, market shares, and growth opportunities of Fully Automatic Wafer Expander market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Hot Plate Contact Heating

Hot Air/Infrared Heating

Zone Temperature Control Heating

Segmentation by Applicable Membrane Materials:

Blue Film

UV Film

PO Film/EVA Film

Segmentation by Stretching Methods:

Single-stage Integral Stretching

Multi-stage Progressive Stretching

Closed-loop Control Precision Stretching

Segmentation by Application:

LED Chip Manufacturing

Semiconductor IC Packaging

Power Devices

Advanced Packaging (WLP)

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

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

Ohmiya Industry

N-TEC Corp.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fully Automatic Wafer Expander market?

What factors are driving Fully Automatic Wafer Expander market growth, globally and by region?

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

How do Fully Automatic Wafer Expander market opportunities vary by end market size?

How does Fully Automatic Wafer Expander break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Fully Automatic Wafer Expander Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Fully Automatic Wafer Expander by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Fully Automatic Wafer Expander by Country/Region, 2021, 2025 & 2032
- 2.2 Fully Automatic Wafer Expander Segment by Type
 - 2.2.1 Hot Plate Contact Heating
 - 2.2.2 Hot Air/Infrared Heating
 - 2.2.3 Zone Temperature Control Heating
 - 2.2.4 Fully Automatic Wafer Expander Sales by Type
 - 2.2.4.1 Global Fully Automatic Wafer Expander Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Fully Automatic Wafer Expander Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Fully Automatic Wafer Expander Sale Price by Type (2021-2026)
- 2.3 Fully Automatic Wafer Expander Segment by Applicable Membrane Materials
 - 2.3.1 Blue Film
 - 2.3.2 UV Film
 - 2.3.3 PO Film/EVA Film
 - 2.3.4 Fully Automatic Wafer Expander Sales by Applicable Membrane Materials
 - 2.3.4.1 Global Fully Automatic Wafer Expander Sales Market Share by Applicable Membrane Materials (2021-2026)
 - 2.3.4.2 Global Fully Automatic Wafer Expander Revenue and Market Share by

Applicable Membrane Materials (2021-2026)

2.3.4.3 Global Fully Automatic Wafer Expander Sale Price by Applicable Membrane Materials (2021-2026)

2.4 Fully Automatic Wafer Expander Segment by Stretching Methods

2.4.1 Single-stage Integral Stretching

2.4.2 Multi-stage Progressive Stretching

2.4.3 Closed-loop Control Precision Stretching

2.4.4 Fully Automatic Wafer Expander Sales by Stretching Methods

2.4.4.1 Global Fully Automatic Wafer Expander Sales Market Share by Stretching Methods (2021-2026)

2.4.4.2 Global Fully Automatic Wafer Expander Revenue and Market Share by Stretching Methods (2021-2026)

2.4.4.3 Global Fully Automatic Wafer Expander Sale Price by Stretching Methods (2021-2026)

2.5 Fully Automatic Wafer Expander Segment by Application

2.5.1 LED Chip Manufacturing

2.5.2 Semiconductor IC Packaging

2.5.3 Power Devices

2.5.4 Advanced Packaging (WLP)

2.5.5 Other

2.5.6 Fully Automatic Wafer Expander Sales by Application

2.5.6.1 Global Fully Automatic Wafer Expander Sale Market Share by Application (2021-2026)

2.5.6.2 Global Fully Automatic Wafer Expander Revenue and Market Share by Application (2021-2026)

2.5.6.3 Global Fully Automatic Wafer Expander Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Fully Automatic Wafer Expander Breakdown Data by Company

3.1.1 Global Fully Automatic Wafer Expander Annual Sales by Company (2021-2026)

3.1.2 Global Fully Automatic Wafer Expander Sales Market Share by Company (2021-2026)

3.2 Global Fully Automatic Wafer Expander Annual Revenue by Company (2021-2026)

3.2.1 Global Fully Automatic Wafer Expander Revenue by Company (2021-2026)

3.2.2 Global Fully Automatic Wafer Expander Revenue Market Share by Company (2021-2026)

3.3 Global Fully Automatic Wafer Expander Sale Price by Company

3.4 Key Manufacturers Fully Automatic Wafer Expander Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Fully Automatic Wafer Expander Product Location Distribution

3.4.2 Players Fully Automatic Wafer Expander Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR FULLY AUTOMATIC WAFER EXPANDER BY GEOGRAPHIC REGION

4.1 World Historic Fully Automatic Wafer Expander Market Size by Geographic Region (2021-2026)

4.1.1 Global Fully Automatic Wafer Expander Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Fully Automatic Wafer Expander Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Fully Automatic Wafer Expander Market Size by Country/Region (2021-2026)

4.2.1 Global Fully Automatic Wafer Expander Annual Sales by Country/Region (2021-2026)

4.2.2 Global Fully Automatic Wafer Expander Annual Revenue by Country/Region (2021-2026)

4.3 Americas Fully Automatic Wafer Expander Sales Growth

4.4 APAC Fully Automatic Wafer Expander Sales Growth

4.5 Europe Fully Automatic Wafer Expander Sales Growth

4.6 Middle East & Africa Fully Automatic Wafer Expander Sales Growth

5 AMERICAS

5.1 Americas Fully Automatic Wafer Expander Sales by Country

5.1.1 Americas Fully Automatic Wafer Expander Sales by Country (2021-2026)

5.1.2 Americas Fully Automatic Wafer Expander Revenue by Country (2021-2026)

5.2 Americas Fully Automatic Wafer Expander Sales by Type (2021-2026)

5.3 Americas Fully Automatic Wafer Expander Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Fully Automatic Wafer Expander Sales by Region

6.1.1 APAC Fully Automatic Wafer Expander Sales by Region (2021-2026)

6.1.2 APAC Fully Automatic Wafer Expander Revenue by Region (2021-2026)

6.2 APAC Fully Automatic Wafer Expander Sales by Type (2021-2026)

6.3 APAC Fully Automatic Wafer Expander Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Fully Automatic Wafer Expander by Country

7.1.1 Europe Fully Automatic Wafer Expander Sales by Country (2021-2026)

7.1.2 Europe Fully Automatic Wafer Expander Revenue by Country (2021-2026)

7.2 Europe Fully Automatic Wafer Expander Sales by Type (2021-2026)

7.3 Europe Fully Automatic Wafer Expander Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Fully Automatic Wafer Expander by Country

8.1.1 Middle East & Africa Fully Automatic Wafer Expander Sales by Country (2021-2026)

8.1.2 Middle East & Africa Fully Automatic Wafer Expander Revenue by Country (2021-2026)

8.2 Middle East & Africa Fully Automatic Wafer Expander Sales by Type (2021-2026)

8.3 Middle East & Africa Fully Automatic Wafer Expander Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Fully Automatic Wafer Expander

10.3 Manufacturing Process Analysis of Fully Automatic Wafer Expander

10.4 Industry Chain Structure of Fully Automatic Wafer Expander

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Fully Automatic Wafer Expander Distributors

11.3 Fully Automatic Wafer Expander Customer

12 WORLD FORECAST REVIEW FOR FULLY AUTOMATIC WAFER EXPANDER BY GEOGRAPHIC REGION

12.1 Global Fully Automatic Wafer Expander Market Size Forecast by Region

12.1.1 Global Fully Automatic Wafer Expander Forecast by Region (2027-2032)

12.1.2 Global Fully Automatic Wafer Expander Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Fully Automatic Wafer Expander Forecast by Type (2027-2032)

12.7 Global Fully Automatic Wafer Expander Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 DISCO

13.1.1 DISCO Company Information

13.1.2 DISCO Fully Automatic Wafer Expander Product Portfolios and Specifications

13.1.3 DISCO Fully Automatic Wafer Expander Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 DISCO Main Business Overview

13.1.5 DISCO Latest Developments

13.2 Ohmiya Industry

13.2.1 Ohmiya Industry Company Information

13.2.2 Ohmiya Industry Fully Automatic Wafer Expander Product Portfolios and Specifications

13.2.3 Ohmiya Industry Fully Automatic Wafer Expander Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Ohmiya Industry Main Business Overview

13.2.5 Ohmiya Industry Latest Developments

13.3 N-TEC Corp.

13.3.1 N-TEC Corp. Company Information

13.3.2 N-TEC Corp. Fully Automatic Wafer Expander Product Portfolios and Specifications

13.3.3 N-TEC Corp. Fully Automatic Wafer Expander Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 N-TEC Corp. Main Business Overview

13.3.5 N-TEC Corp. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Fully Automatic Wafer Expander Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Fully Automatic Wafer Expander Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Hot Plate Contact Heating
- Table 4. Major Players of Hot Air/Infrared Heating
- Table 5. Major Players of Zone Temperature Control Heating
- Table 6. Global Fully Automatic Wafer Expander Sales by Type (2021-2026) & (Units)
- Table 7. Global Fully Automatic Wafer Expander Sales Market Share by Type (2021-2026)
- Table 8. Global Fully Automatic Wafer Expander Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Fully Automatic Wafer Expander Revenue Market Share by Type (2021-2026)
- Table 10. Global Fully Automatic Wafer Expander Sale Price by Type (2021-2026) & (K US\$/Unit)
- Table 11. Major Players of Blue Film
- Table 12. Major Players of UV Film
- Table 13. Major Players of PO Film/EVA Film
- Table 14. Global Fully Automatic Wafer Expander Sales by Applicable Membrane Materials (2021-2026) & (Units)
- Table 15. Global Fully Automatic Wafer Expander Sales Market Share by Applicable Membrane Materials (2021-2026)
- Table 16. Global Fully Automatic Wafer Expander Revenue by Applicable Membrane Materials (2021-2026) & (\$ million)
- Table 17. Global Fully Automatic Wafer Expander Revenue Market Share by Applicable Membrane Materials (2021-2026)
- Table 18. Global Fully Automatic Wafer Expander Sale Price by Applicable Membrane Materials (2021-2026) & (K US\$/Unit)
- Table 19. Major Players of Single-stage Integral Stretching
- Table 20. Major Players of Multi-stage Progressive Stretching
- Table 21. Major Players of Closed-loop Control Precision Stretching
- Table 22. Global Fully Automatic Wafer Expander Sales by Stretching Methods (2021-2026) & (Units)
- Table 23. Global Fully Automatic Wafer Expander Sales Market Share by Stretching

Methods (2021-2026)

Table 24. Global Fully Automatic Wafer Expander Revenue by Stretching Methods (2021-2026) & (\$ million)

Table 25. Global Fully Automatic Wafer Expander Revenue Market Share by Stretching Methods (2021-2026)

Table 26. Global Fully Automatic Wafer Expander Sale Price by Stretching Methods (2021-2026) & (K US\$/Unit)

Table 27. Global Fully Automatic Wafer Expander Sale by Application (2021-2026) & (Units)

Table 28. Global Fully Automatic Wafer Expander Sale Market Share by Application (2021-2026)

Table 29. Global Fully Automatic Wafer Expander Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Fully Automatic Wafer Expander Revenue Market Share by Application (2021-2026)

Table 31. Global Fully Automatic Wafer Expander Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 32. Global Fully Automatic Wafer Expander Sales by Company (2021-2026) & (Units)

Table 33. Global Fully Automatic Wafer Expander Sales Market Share by Company (2021-2026)

Table 34. Global Fully Automatic Wafer Expander Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Fully Automatic Wafer Expander Revenue Market Share by Company (2021-2026)

Table 36. Global Fully Automatic Wafer Expander Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 37. Key Manufacturers Fully Automatic Wafer Expander Producing Area Distribution and Sales Area

Table 38. Players Fully Automatic Wafer Expander Products Offered

Table 39. Fully Automatic Wafer Expander Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Fully Automatic Wafer Expander Sales by Geographic Region (2021-2026) & (Units)

Table 43. Global Fully Automatic Wafer Expander Sales Market Share Geographic Region (2021-2026)

Table 44. Global Fully Automatic Wafer Expander Revenue by Geographic Region

(2021-2026) & (\$ millions)

Table 45. Global Fully Automatic Wafer Expander Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Fully Automatic Wafer Expander Sales by Country/Region (2021-2026) & (Units)

Table 47. Global Fully Automatic Wafer Expander Sales Market Share by Country/Region (2021-2026)

Table 48. Global Fully Automatic Wafer Expander Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Fully Automatic Wafer Expander Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Fully Automatic Wafer Expander Sales by Country (2021-2026) & (Units)

Table 51. Americas Fully Automatic Wafer Expander Sales Market Share by Country (2021-2026)

Table 52. Americas Fully Automatic Wafer Expander Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Fully Automatic Wafer Expander Sales by Type (2021-2026) & (Units)

Table 54. Americas Fully Automatic Wafer Expander Sales by Application (2021-2026) & (Units)

Table 55. APAC Fully Automatic Wafer Expander Sales by Region (2021-2026) & (Units)

Table 56. APAC Fully Automatic Wafer Expander Sales Market Share by Region (2021-2026)

Table 57. APAC Fully Automatic Wafer Expander Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Fully Automatic Wafer Expander Sales by Type (2021-2026) & (Units)

Table 59. APAC Fully Automatic Wafer Expander Sales by Application (2021-2026) & (Units)

Table 60. Europe Fully Automatic Wafer Expander Sales by Country (2021-2026) & (Units)

Table 61. Europe Fully Automatic Wafer Expander Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Fully Automatic Wafer Expander Sales by Type (2021-2026) & (Units)

Table 63. Europe Fully Automatic Wafer Expander Sales by Application (2021-2026) & (Units)

Table 64. Middle East & Africa Fully Automatic Wafer Expander Sales by Country (2021-2026) & (Units)

Table 65. Middle East & Africa Fully Automatic Wafer Expander Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Fully Automatic Wafer Expander Sales by Type (2021-2026) & (Units)

Table 67. Middle East & Africa Fully Automatic Wafer Expander Sales by Application (2021-2026) & (Units)

Table 68. Key Market Drivers & Growth Opportunities of Fully Automatic Wafer Expander

Table 69. Key Market Challenges & Risks of Fully Automatic Wafer Expander

Table 70. Key Industry Trends of Fully Automatic Wafer Expander

Table 71. Fully Automatic Wafer Expander Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Fully Automatic Wafer Expander Distributors List

Table 74. Fully Automatic Wafer Expander Customer List

Table 75. Global Fully Automatic Wafer Expander Sales Forecast by Region (2027-2032) & (Units)

Table 76. Global Fully Automatic Wafer Expander Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Fully Automatic Wafer Expander Sales Forecast by Country (2027-2032) & (Units)

Table 78. Americas Fully Automatic Wafer Expander Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Fully Automatic Wafer Expander Sales Forecast by Region (2027-2032) & (Units)

Table 80. APAC Fully Automatic Wafer Expander Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Fully Automatic Wafer Expander Sales Forecast by Country (2027-2032) & (Units)

Table 82. Europe Fully Automatic Wafer Expander Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Fully Automatic Wafer Expander Sales Forecast by Country (2027-2032) & (Units)

Table 84. Middle East & Africa Fully Automatic Wafer Expander Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Fully Automatic Wafer Expander Sales Forecast by Type (2027-2032) & (Units)

Table 86. Global Fully Automatic Wafer Expander Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global Fully Automatic Wafer Expander Sales Forecast by Application

(2027-2032) & (Units)

Table 88. Global Fully Automatic Wafer Expander Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. DISCO Basic Information, Fully Automatic Wafer Expander Manufacturing Base, Sales Area and Its Competitors

Table 90. DISCO Fully Automatic Wafer Expander Product Portfolios and Specifications

Table 91. DISCO Fully Automatic Wafer Expander Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 92. DISCO Main Business

Table 93. DISCO Latest Developments

Table 94. Ohmiya Industry Basic Information, Fully Automatic Wafer Expander Manufacturing Base, Sales Area and Its Competitors

Table 95. Ohmiya Industry Fully Automatic Wafer Expander Product Portfolios and Specifications

Table 96. Ohmiya Industry Fully Automatic Wafer Expander Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 97. Ohmiya Industry Main Business

Table 98. Ohmiya Industry Latest Developments

Table 99. N-TEC Corp. Basic Information, Fully Automatic Wafer Expander Manufacturing Base, Sales Area and Its Competitors

Table 100. N-TEC Corp. Fully Automatic Wafer Expander Product Portfolios and Specifications

Table 101. N-TEC Corp. Fully Automatic Wafer Expander Sales (Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 102. N-TEC Corp. Main Business

Table 103. N-TEC Corp. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Fully Automatic Wafer Expander
- Figure 2. Fully Automatic Wafer Expander Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Fully Automatic Wafer Expander Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Fully Automatic Wafer Expander Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Fully Automatic Wafer Expander Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Fully Automatic Wafer Expander Sales Market Share by Country/Region (2025)
- Figure 10. Fully Automatic Wafer Expander Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Hot Plate Contact Heating
- Figure 12. Product Picture of Hot Air/Infrared Heating
- Figure 13. Product Picture of Zone Temperature Control Heating
- Figure 14. Global Fully Automatic Wafer Expander Sales Market Share by Type in 2026
- Figure 15. Global Fully Automatic Wafer Expander Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Blue Film
- Figure 17. Product Picture of UV Film
- Figure 18. Product Picture of PO Film/EVA Film
- Figure 19. Global Fully Automatic Wafer Expander Sales Market Share by Applicable Membrane Materials in 2026
- Figure 20. Global Fully Automatic Wafer Expander Revenue Market Share by Applicable Membrane Materials (2021-2026)
- Figure 21. Product Picture of Single-stage Integral Stretching
- Figure 22. Product Picture of Multi-stage Progressive Stretching
- Figure 23. Product Picture of Closed-loop Control Precision Stretching
- Figure 24. Global Fully Automatic Wafer Expander Sales Market Share by Stretching Methods in 2026
- Figure 25. Global Fully Automatic Wafer Expander Revenue Market Share by Stretching Methods (2021-2026)
- Figure 26. Fully Automatic Wafer Expander Consumed in LED Chip Manufacturing

Figure 27. Global Fully Automatic Wafer Expander Market: LED Chip Manufacturing (2021-2026) & (Units)

Figure 28. Fully Automatic Wafer Expander Consumed in Semiconductor IC Packaging

Figure 29. Global Fully Automatic Wafer Expander Market: Semiconductor IC Packaging (2021-2026) & (Units)

Figure 30. Fully Automatic Wafer Expander Consumed in Power Devices

Figure 31. Global Fully Automatic Wafer Expander Market: Power Devices (2021-2026) & (Units)

Figure 32. Fully Automatic Wafer Expander Consumed in Advanced Packaging (WLP)

Figure 33. Global Fully Automatic Wafer Expander Market: Advanced Packaging (WLP) (2021-2026) & (Units)

Figure 34. Fully Automatic Wafer Expander Consumed in Other

Figure 35. Global Fully Automatic Wafer Expander Market: Other (2021-2026) & (Units)

Figure 36. Global Fully Automatic Wafer Expander Sale Market Share by Application (2025)

Figure 37. Global Fully Automatic Wafer Expander Revenue Market Share by Application in 2026

Figure 38. Fully Automatic Wafer Expander Sales by Company in 2026 (Units)

Figure 39. Global Fully Automatic Wafer Expander Sales Market Share by Company in 2026

Figure 40. Fully Automatic Wafer Expander Revenue by Company in 2026 (\$ millions)

Figure 41. Global Fully Automatic Wafer Expander Revenue Market Share by Company in 2026

Figure 42. Global Fully Automatic Wafer Expander Sales Market Share by Geographic Region (2021-2026)

Figure 43. Global Fully Automatic Wafer Expander Revenue Market Share by Geographic Region in 2026

Figure 44. Americas Fully Automatic Wafer Expander Sales 2021-2026 (Units)

Figure 45. Americas Fully Automatic Wafer Expander Revenue 2021-2026 (\$ millions)

Figure 46. APAC Fully Automatic Wafer Expander Sales 2021-2026 (Units)

Figure 47. APAC Fully Automatic Wafer Expander Revenue 2021-2026 (\$ millions)

Figure 48. Europe Fully Automatic Wafer Expander Sales 2021-2026 (Units)

Figure 49. Europe Fully Automatic Wafer Expander Revenue 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Fully Automatic Wafer Expander Sales 2021-2026 (Units)

Figure 51. Middle East & Africa Fully Automatic Wafer Expander Revenue 2021-2026 (\$ millions)

Figure 52. Americas Fully Automatic Wafer Expander Sales Market Share by Country in 2026

Figure 53. Americas Fully Automatic Wafer Expander Revenue Market Share by Country (2021-2026)

Figure 54. Americas Fully Automatic Wafer Expander Sales Market Share by Type (2021-2026)

Figure 55. Americas Fully Automatic Wafer Expander Sales Market Share by Application (2021-2026)

Figure 56. United States Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Fully Automatic Wafer Expander Sales Market Share by Region in 2026

Figure 61. APAC Fully Automatic Wafer Expander Revenue Market Share by Region (2021-2026)

Figure 62. APAC Fully Automatic Wafer Expander Sales Market Share by Type (2021-2026)

Figure 63. APAC Fully Automatic Wafer Expander Sales Market Share by Application (2021-2026)

Figure 64. China Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 67. Southeast Asia Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 68. India Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 69. Australia Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 71. Europe Fully Automatic Wafer Expander Sales Market Share by Country in 2026

Figure 72. Europe Fully Automatic Wafer Expander Revenue Market Share by Country

(2021-2026)

Figure 73. Europe Fully Automatic Wafer Expander Sales Market Share by Type

(2021-2026)

Figure 74. Europe Fully Automatic Wafer Expander Sales Market Share by Application

(2021-2026)

Figure 75. Germany Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 76. France Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa Fully Automatic Wafer Expander Sales Market Share by Country (2021-2026)

Figure 81. Middle East & Africa Fully Automatic Wafer Expander Sales Market Share by Type (2021-2026)

Figure 82. Middle East & Africa Fully Automatic Wafer Expander Sales Market Share by Application (2021-2026)

Figure 83. Egypt Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries Fully Automatic Wafer Expander Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of Fully Automatic Wafer Expander in 2026

Figure 89. Manufacturing Process Analysis of Fully Automatic Wafer Expander

Figure 90. Industry Chain Structure of Fully Automatic Wafer Expander

Figure 91. Channels of Distribution

Figure 92. Global Fully Automatic Wafer Expander Sales Market Forecast by Region (2027-2032)

Figure 93. Global Fully Automatic Wafer Expander Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global Fully Automatic Wafer Expander Sales Market Share Forecast by Type (2027-2032)

Figure 95. Global Fully Automatic Wafer Expander Revenue Market Share Forecast by Type (2027-2032)

Figure 96. Global Fully Automatic Wafer Expander Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global Fully Automatic Wafer Expander Revenue Market Share Forecast by Application (2027-2032)

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