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Global Precision Dicing Blades Market Growth 2026-2032

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Abstracts

The global Precision Dicing Blades market size is predicted to grow from US$ 523 million in 2025 to US$ 780 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Precision dicing blades are ultra-thin abrasive tools mounted on the spindles of high-precision dicing saws to perform full cutting, partial cutting, grooving and singulation of wafers and other hard and brittle materials. They generally consist of diamond abrasive grains, a bonding system and a supporting structure. Major configurations include hub blades and hubless blades, while the principal bonding systems comprise electroformed, resin and metal bonds. Key performance parameters include blade thickness, grit size and concentration, blade exposure, rigidity, service life, kerf width, chipping control and cutting stability.

Precision dicing blades are primarily used for silicon wafers, silicon carbide, gallium arsenide, gallium phosphide, lithium tantalate and other semiconductor or compound semiconductor wafers, as well as integrated circuit packages, light-emitting diode substrates, ceramics, glass, quartz, ferrite and electronic components. They are high-frequency replacement process consumables used with dicing equipment. The product scope covers newly manufactured blades used in precision dicing and package singulation, while excluding dicing saws, grinding wheels, dry polishing wheels, dressing boards, laser and plasma dicing equipment, and related processing services.

In 2025, global production of precision dicing blades reached approximately 6.8 million to 7.4 million pieces. On an ex-factory basis for products used in semiconductor wafers, packaging substrates, electronic ceramics and precision electronic components, the weighted average FOB price was approximately USD 72 to USD 80 per piece, while

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ultra-thin blades, high-rigidity metal-bond blades and customized hub blades for specialized materials were generally priced above this range.

Market Opportunities and Core Growth Drivers

The global precision dicing blade market is shifting from conventional wafer-cutting consumables toward application-specific process tools offering higher yield, tighter consistency and improved material compatibility. The expansion of artificial intelligence servers, advanced logic devices, high-bandwidth memory and Chiplet architectures is accelerating wafer thinning, die miniaturization and multi-die integration, increasing demand for blades capable of delivering narrower kerfs, reduced chipping and improved cutting straightness. Recovering global silicon wafer shipments and continued growth in 300 mm wafer demand provide a solid volume base, while the increasing use of silicon carbide, gallium arsenide, lithium tantalate, ceramics and glass is raising the value of metal-bond, electroformed and customized ultra-thin blades. Market growth is therefore expected to be driven increasingly by product mix and processing value rather than by standard blade volumes alone.

Industry Chain and Commercial Model

Upstream inputs primarily include synthetic diamond micron powders, nickel and electroforming chemicals, resin and metal bonding materials, steel cores and aluminum hubs. Midstream production involves abrasive grading, bond formulation, electroforming or sintering, ultra-thin forming, edge conditioning, dynamic balancing and cutting-performance inspection. Downstream customers include wafer manufacturers, integrated device manufacturers, outsourced semiconductor assembly and test companies, power semiconductor producers, and manufacturers of light-emitting diodes, microelectromechanical systems and electronic components. Because blades must be qualified according to substrate material, workpiece thickness, cutting speed, chipping limits and spindle compatibility, approved products generally generate recurring orders after entering customer-qualified supplier systems. The commercial model consequently combines equipment-installed-base support, process qualification and repeat consumable sales.

Downstream Demand Trends

Silicon wafer dicing and conventional semiconductor package singulation will remain the largest demand base, while advanced packaging, ultra-thin wafers, silicon carbide power devices and compound semiconductors are expected to deliver faster value

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growth. Laser and plasma dicing will replace part of the mechanical blade process in low-k materials, extremely thin dies and complex wafer-level packages. Nevertheless, blade dicing retains significant advantages in processing cost, manufacturing flexibility, installed equipment base and compatibility with multiple materials. Future competition will focus on thinner cutting edges, higher rigidity, longer blade life, compatibility with automatic blade-changing systems and customized process solutions for specific substrates.

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

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

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

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

Segmentation by Type:

Aluminum Hub Blades

Annular Hubless Blades

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Steel Core Blades

Segmentation by End Use Industry:

Integrated Circuits and Memory

Power Semiconductor Devices

Optoelectronics and MEMS

Electronic Components and Others

Segmentation by Bond Type:

Electroformed Nickel Bond

Resin Bond

Sintered Metal Bond

Others

Segmentation by Blade Thickness:

Up to 30 ?m

More than 30 ?m and up to 60 ?m

More than 60 ?m

Segmentation by Application:

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Semiconductor Wafers

Semiconductor Packages and Substrates

Electronic Components and Optical Parts

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

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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.

DISCO Corporation

Asahi Diamond Industrial Co., Ltd.

Advanced Dicing Technologies Ltd.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

Kulicke and Soffa Industries, Inc.

EHWA Diamond Industrial Co., Ltd.

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SHINHAN DIAMOND IND. CO., LTD.

KODIS CO., LTD.

KINIK Company

NDS (Taiwan) Co., Ltd.

Sinomach Diamond (Henan) Co., Ltd.

WINTIME Semiconductor Technology Co., Ltd.

Shanghai Sinyang Semiconductor Materials Co., Ltd.

Suzhou Sail Science & Technology Co., Ltd.

Key Questions Addressed in this Report

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

What factors are driving Precision Dicing Blades market growth, globally and by region?

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

How do Precision Dicing Blades market opportunities vary by end market size?

How does Precision Dicing Blades break out by Type, by Application?

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