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Global Selective Etch Equipment Market Growth 2026-2032

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Abstracts

The global Selective Etch Equipment market size is predicted to grow from US$ 2788 million in 2025 to US$ 5957 million in 2032; it is expected to grow at a CAGR of 11.2% from 2026 to 2032.

Selective etch equipment refers to semiconductor process equipment designed to remove target materials with high selectivity, low damage, and tightly controlled profile performance during wafer fabrication, advanced packaging, MEMS, compound semiconductor, and optoelectronic device manufacturing. This study focuses on equipment platforms capable of selective material removal in multi-material stacks, three-dimensional device structures, nanoscale critical dimensions, high-aspect-ratio features, and sensitive interfaces. Major product forms include selective dry etch platforms, gas chemical etch systems, remote plasma etch systems, isotropic selective etch tools, quasi-atomic-layer etch systems, and single-wafer or batch wet etch systems used for selective removal of UBM, TSV, metals, dielectrics, and compound semiconductor materials. Key performance parameters include material-to-material selectivity, within-wafer and wafer-to-wafer uniformity, etch rate, surface roughness, CD bias, plasma-induced damage, particle control, chamber stability, temperature control, endpoint control, and high-volume manufacturing repeatability. The value of this equipment category lies in enabling advanced logic GAA structures, next-generation memory, 3D devices, advanced packaging, and specialty devices where conventional etch and clean tools are no longer sufficient.

Based on our research, selective etch equipment should be understood as a material-selectivity control platform rather than a simple extension of conventional etch tools. Conventional dry etch systems are primarily evaluated by pattern transfer, anisotropic profile control, etch rate, and high-aspect-ratio capability. Selective etch tools, by

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contrast, are evaluated by their ability to remove only the intended material while preserving neighboring films, interfaces, stop layers, and sensitive device structures. This distinction becomes critical as device architectures move from planar and FinFET structures toward gate-all-around nanosheets, 3D NAND, high-density DRAM, and advanced heterogeneous integration.

Demand growth is increasingly driven by three structural forces: GAA logic, three-dimensional memory, and advanced packaging. GAA logic requires highly selective removal of sacrificial layers and precise control of nanosheet or nanowire structures. 3D NAND and DRAM require more demanding etch and clean steps as vertical structures become deeper, thinner, and more material-diverse. Advanced packaging, especially HBM and chiplet integration, drives wet selective etch demand for UBM, TSV, metal, dielectric, and residue-related processes. Policy and supply-chain dynamics also matter. Localization programs in China, capacity investment in Japan and Korea, and strategic equipment controls in the United States and allied regions are changing the regional structure of tool qualification, but advanced selective dry etch remains one of the most difficult segments to localize quickly.

From a technology-roadmap perspective, the industry is moving from standalone etch chambers toward integrated process platforms combining material science, plasma chemistry, radical generation, temperature control, endpoint control, and software-enabled process repeatability. The competitive edge lies not only in chamber hardware, but also in process libraries, co-development with device makers, installed-base learning, uptime, consumables lifetime, and integration with deposition, clean, and metrology steps. This makes the market attractive but difficult for new entrants: specialty and wet-process niches remain open, while leading-edge dry selective etch is likely to remain dominated by a small number of global suppliers over the medium term.

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

This Insight Report provides a comprehensive analysis of the global Selective Etch Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity.

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This report also analyzes the strategies of leading global companies with a focus on Selective Etch Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Selective Etch Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Selective Etch 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 Selective Etch Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Selective Etch Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dry Selective Etch Equipment

Wet Selective Etch Equipment

Other Selective Etch Equipment

Segmentation by Wafer Size:

300 mm Equipment

200 mm Equipment

150 mm and Below Equipment

Other Substrate Size Equipment

Segmentation by Etch Profile:

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Isotropic Selective Etch

Anisotropic Selective Etch

Other Etch Profiles

Segmentation by Application:

Nanosheet / GAA Release Etch

Dielectric Selective Removal

TSV / UBM / RDL Etch

Other Process Applications

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

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- 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.

- Applied Materials, Inc.
- Lam Research Corporation

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Tokyo Electron Limited

KLA Corporation

Hitachi High-Tech Corporation

NAURA Technology Group Co., Ltd.

Advanced Micro-Fabrication Equipment Inc. China

Beijing E-Town Semiconductor Technology Co., Ltd.

SEMES Co., Ltd.

ACM Research, Inc.

SCREEN Semiconductor Solutions Co., Ltd.

Oxford Instruments plc

Veeco Instruments Inc.

Plasma-Therm LLC

ULVAC, Inc.

Samco Inc.

Canon ANELVA Corporation

GigaLane Co., Ltd.

ClassOne Technology, Inc.

RENA Technologies GmbH

NexGen Wafer Systems Pte. Ltd.

SENTECH Instruments GmbH

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Trion Technology, Inc.

SPT Corporation

Siconnex customized solutions GmbH

AP&S International GmbH

JST Manufacturing Inc.

Modutek Corporation

Akrion Technologies LLC

Key Questions Addressed in this Report

What is the 10-year outlook for the global Selective Etch Equipment market?

What factors are driving Selective Etch Equipment market growth, globally and by region?

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

How do Selective Etch Equipment market opportunities vary by end market size?

How does Selective Etch Equipment break out by Type, by Application?

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