

Global Semiconductor Dicing Blades Market Growth 2026-2032

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Abstracts

The global Semiconductor Dicing Blades market size is predicted to grow from US\$ 520 million in 2025 to US\$ 782 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 2032.

Semiconductor dicing blades are ultra-thin circular precision tools that use diamond abrasives as the primary cutting medium and are mounted on high-speed precision dicing saw spindles to separate semiconductor wafers, wafer-level packages, and molded package strips into individual dies or devices. The blades are principally manufactured with electroformed nickel, resin, or sintered metal bonds and are supplied in hub and hubless configurations. The core commercial cutting-edge thickness generally ranges from approximately 15 to 750 micrometers. Wafer dicing products are primarily concentrated between approximately 15 and 120 micrometers, while semiconductor package singulation blades generally range from approximately 50 to 750 micrometers. Selected narrow-kerf products can achieve cutting-edge thicknesses of approximately 9 micrometers.

Semiconductor dicing blades are used to process silicon, gallium arsenide, indium phosphide, silicon carbide, gallium nitride, and other semiconductor wafers, as well as wafer-level packages, flip-chip packages, ball grid arrays, land grid arrays, quad-flat no-lead packages, microelectromechanical systems, sensors, and light-emitting diode packages. The products must balance kerf width, chipping control, blade life, self-sharpening performance, cutting speed, and batch consistency and are therefore critical consumable precision tools in semiconductor back-end manufacturing. The category excludes ingot slicing blades, wafer thinning wheels, laser and plasma dicing equipment, and general-purpose industrial blades used to process ordinary glass, ceramics, magnetic materials, and printed circuit boards.

In 2025, global semiconductor dicing blade production reached approximately 6.9 million to 7.3 million pieces, while the weighted ex-works price of mainstream products was approximately USD 72 to USD 78 per piece. Volume-produced electroformed nickel wafer blades and standard package singulation blades were mainly concentrated within this range, while ultra-thin hub blades, silicon carbide and compound semiconductor blades, low-chipping package blades, and low-volume customized products generally recorded ex-works prices above USD 100 per piece.

Opportunities and Core Market Drivers

The continued expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, automotive electronics, power semiconductors, radio-frequency communications, and intelligent sensors is supporting stable consumables demand for semiconductor dicing blades. The transition toward thinner wafers, narrower dicing streets, and smaller dies requires wafer blades with reduced cutting-edge thickness, more uniform abrasive distribution, and greater process stability. At the same time, wafer-level packaging, flip-chip integration, three-dimensional integration, and multi-die packaging are creating more complex combinations of metal layers, dielectric materials, and molding compounds, driving demand for low-chipping, high-rigidity, and long-life package singulation blades. The commercialization of hard and brittle materials, including silicon carbide, gallium nitride, and gallium arsenide, is also expanding opportunities for specialized bond formulations and high-performance diamond tools.

Industry Chain and Downstream Demand Trends

The upstream semiconductor dicing blade supply chain includes synthetic diamond powders, high-purity nickel and nickel salts, resins, metal-bond powders, steel cores, and aluminum hubs. Midstream operations include abrasive grading, electroforming, molding and curing, powder sintering, precision grinding, dynamic balancing, and application qualification. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, wafer manufacturers, and producers of light-emitting diodes and microelectromechanical systems. Because blade performance directly affects chipping, cracking, delamination, die strength, and final production yield, new products normally require extensive material matching and volume-production qualification.

Future demand will increasingly focus on the integrated matching of blades with dicing

equipment, spindle systems, cooling fluids, and specific material structures. Competition will consequently shift from initial purchase price toward cost per cutting length, equipment utilization, blade replacement frequency, and total manufacturing yield. Laser and plasma dicing technologies are expected to expand in selected advanced applications, but mechanical dicing blades will retain important cost and throughput advantages in mature silicon devices, discrete semiconductors, power devices, and high-volume package singulation.

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

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

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

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

Segmentation by Type:

Wafer Dicing Blades

Package Singulation Blades

Segmentation by Blade Structure:

Hub Blades

Hubless Blades

Segmentation by Workpiece Material:

Silicon and Silicon Based Wafers

Compound Semiconductor Wafers

Molded Package Composites

Others

Segmentation by Bond Type:

Electroformed Nickel Bond

Resin Bond

Sintered Metal Bond

Others

Segmentation by Application:

Logic and Memory Devices

Power Semiconductor Devices

Optoelectronic and Radio Frequency Devices

MEMS and Sensor Devices

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.

Shinhan Diamond Industrial Co., Ltd.

YDI 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.

Dongguan HEF Mechanical Electrical Equipment Co., Ltd.

Key Questions Addressed in this Report

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

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

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

How do Semiconductor Dicing Blades market opportunities vary by end market

size?

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

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