

Global Semiconductor Wafer Dicing Blades Market Growth 2026-2032

<https://marketpublishers.com/r/GA0AB2691AE5EN.html>

Date: October 2026

Pages: 134

Price: US\$ 3,660.00 (Single User License)

ID: GA0AB2691AE5EN

Abstracts

The global Semiconductor Wafer Dicing Blades market size is predicted to grow from US\$ 455 million in 2025 to US\$ 682 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 2032.

Semiconductor wafer dicing blades are ultra-thin circular precision tools mounted on high-speed dicing saw spindles to mechanically cut processed semiconductor wafers and separate them into individual dies. The products generally consist of diamond abrasives embedded in electroformed nickel, resin, or metal bonds and are primarily supplied as hub blades or hubless blades. Cutting-edge thickness typically ranges from approximately 9 to 120 micrometers, with products between 20 and 60 micrometers representing the principal commercial specifications. Key performance parameters include kerf width, frontside and backside chipping, cutting speed, blade life, self-sharpening capability, and batch consistency.

Semiconductor wafer dicing blades are primarily used to process silicon, silicon carbide, gallium nitride, gallium arsenide, indium phosphide, lithium tantalate, and other semiconductor or functional wafers. Major applications include logic devices, memory devices, power semiconductors, radio-frequency devices, optoelectronic devices, microelectromechanical systems, and sensors. These blades are critical consumable precision tools in semiconductor back-end manufacturing. The category excludes ingot slicing blades, wafer thinning wheels, semiconductor package substrate singulation blades, general-purpose glass and ceramic cutting blades, laser dicing equipment, and plasma dicing equipment.

In 2025, global semiconductor wafer dicing blade production reached approximately 5.8 million to 6.1 million pieces, while the weighted FOB price of mainstream products

ranged from approximately USD 74 to USD 82 per piece. Standard electroformed nickel-bond hub and hubless blades were mainly concentrated within this range, while ultra-thin products below 20 micrometers, blades designed for silicon carbide and compound semiconductor wafers, and customized products for specialized dicing-street structures generally commanded higher unit prices.

The rapid expansion of artificial intelligence computing, high-performance computing, high-bandwidth memory, advanced logic devices, and data center infrastructure is supporting continued investment in high-end wafer manufacturing, wafer-level processing, and back-end dicing capacity. As dies become smaller, wafers become thinner, and dicing streets become narrower, manufacturers require tighter kerf control, reduced backside chipping, higher die strength, and greater process stability. These requirements are increasing demand for ultra-thin cutting edges, highly uniform diamond abrasives, and precisely controlled electroformed bond systems. The growing use of silicon carbide, gallium nitride, and gallium arsenide wafers in electric vehicles, industrial power systems, renewable energy, and communications infrastructure is also creating opportunities for specialized bond formulations, high-rigidity blades, and low-damage dicing solutions. Semiconductor manufacturing localization and supply-chain security initiatives across China, South Korea, Taiwan, North America, and Europe are further supporting suppliers with local production, rapid qualification, and on-site technical service capabilities.

Industry Chain and Downstream Demand Trends

The upstream supply chain for semiconductor wafer dicing blades includes synthetic diamond powders, high-purity nickel and nickel salts, resins, metal-bond materials, aluminum hubs, and precision blade substrates. Midstream processes include abrasive classification, electroforming, molding and curing, sintering, precision dressing, dynamic balancing, and application qualification. Principal downstream customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, wafer foundries, and specialized wafer dicing service providers. Although blade expenditure represents only a small proportion of total wafer value, blade performance directly affects chipping, cracking, delamination, die strength, and final production yield. Customers therefore generally require extensive process qualification and are unlikely to change suppliers solely on the basis of initial purchasing price.

Future demand will increasingly emphasize the systematic matching of blades with wafer materials, dicing-street structures, spindle systems, cooling fluids, and process

parameters. Competition is expected to shift from unit blade pricing toward cost per cutting length, replacement frequency, equipment utilization, and overall production yield. Stealth laser dicing, laser full-cut processing, and plasma dicing will gain adoption in selected ultra-thin wafer and advanced-device applications. Nevertheless, mechanical dicing blades will retain an important position in silicon wafers, power devices, radio-frequency devices, and most compound semiconductor wafer applications because of their mature processes, broad installed equipment base, processing flexibility, and controllable high-volume production costs.

LP Information, Inc. (LPI) ' newest research report, the "Semiconductor Wafer Dicing Blades Industry Forecast" looks at past sales and reviews total world Semiconductor Wafer Dicing Blades sales in 2025, providing a comprehensive analysis by region and market sector of projected Semiconductor Wafer Dicing Blades sales for 2026 through 2032. With Semiconductor Wafer 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 Wafer Dicing Blades industry.

This Insight Report provides a comprehensive analysis of the global Semiconductor Wafer 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 Wafer 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 Wafer Dicing Blades market.

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

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

Segmentation by Type:

Hub Blades

Hubless Blades

Segmentation by Wafer Material:

Silicon Wafers

Silicon Carbide and Gallium Nitride Wafers

Gallium Arsenide and Indium Phosphide Wafers

Others

Segmentation by Blade Thickness:

Less Than 20 Micrometers

20 Micrometers to Less Than 40 Micrometers

40 Micrometers to Less Than 80 Micrometers

80 Micrometers and Above

Segmentation by Bond Type:

Electroformed Nickel Bond

Resin 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.

Kulicke and Soffa Industries, Inc.

Saint-Gobain S.A.

Thermocarbon Inc.

UKAM Industrial Superhard Tools

YMB Co., Ltd.

EHWA DIAMOND INDUSTRIAL CO., LTD.

YDI Co., Ltd.

KODIS Co., Ltd.

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 Semiconductor Wafer Dicing Blades market?

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

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

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

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

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