

Global SiC Semiconductor Processing Equipment Market Growth 2026-2032

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Abstracts

The global SiC Semiconductor Processing Equipment market size is predicted to grow from US\$ 3207 million in 2025 to US\$ 8035 million in 2032; it is expected to grow at a CAGR of 14.8% from 2026 to 2032.

SiC Semiconductor Processing Equipment refers to the core toolsets required across the SiC value chain?SiC substrate manufacturing, SiC epitaxy, and SiC device front-end processing?with the emphasis on tools that directly determine yield, reliability, and cost per cm². Compared with silicon, SiC processing imposes distinct equipment requirements driven by (i) a hard/brittle wafering and surface-finishing regime, and (ii) a device flow that typically depends on heated ion implantation, very high-temperature activation anneals, and robust plasma etching/ohmic-contact formation, making thermal budgets, chamber materials, particle control, and defect sensitivity materially more demanding.

The market can be framed around 10 core equipment categories: (1) SiC crystal growth (PVT) platforms engineered for long-cycle thermal-field stability (e.g., PVA TePla/CGS highlights PVT systems for SiC single crystals); (2) boule processing & wafering (orientation/end-face, slicing) to reduce kerf loss and increase wafers per boule (e.g., DISCO's KABRA laser ingot slicing applicable to SiC; Okamoto's SiC ingot grinding/orientation workflow); (3) wafer surface finishing (grinding/lapping/DSP/CMP) to reach tight TTV/warp and nanometer-scale surfaces (e.g., EBARA CMP systems emphasize nano-level planarity and contamination/particle mitigation concepts); (4) cleaning & surface preparation (single-wafer/batch, megasonic, dry-in/dry-out) to manage particle sensitivity (e.g., SCREEN single-wafer cleaner product line); (5) metrology & defect inspection for substrates/epi/patterned wafers?closing feedback loops on BPDs/stacking faults and other SiC-relevant defects (e.g., KLA Candela for

SiC-oriented inspection and classification); (6) SiC epitaxy (high-temperature CVD reactors) focused on low defectivity, thickness/doping uniformity, and output per m² (e.g., AIXTRON G10-SiC for 150/200 mm; ASM PE208 positioned for yield/throughput/cost); (7) lithography & track (often mainstream silicon toolsets, but critical for trench/termination patterning); (8) plasma etch & ash/strip where SiC deep/trench etches demand high-density plasma with low damage and tight profile control (e.g., Oxford Instruments' ICP-RIE tooling and SiC-focused etch content); (9) thin film deposition & metallization (CVD/ALD/PVD) for dielectrics/barriers/metals (Applied Materials summarizes PVD/CVD/ALD as core deposition technologies in semiconductor manufacturing); and (10) doping & thermal processing (implant/activation anneal/oxidation) that defines the SiC "high-temperature window" (Axcelis highlights high-temperature implant capability and Si/SiC flexibility; Nissin highlights high-temperature SiC implantation; centrotherm positions c.ACTIVATOR for up to 2000°C anneals and c.OXIDATOR for SiC oxidation/anneal up to 1500°C).

The equipment challenge in SiC is inherently cross-step coupled: upstream wafering/surface finishing must minimize damage layers and particles on a hard/brittle material; epitaxy must control defect propagation and doping/thickness uniformity that directly map into device blocking/leakage behavior; and device fabrication typically requires heated implantation followed by extreme-temperature activation anneals, while plasma etches (especially trenches/deep features) must balance rate, selectivity, and low-damage surfaces to avoid reliability penalties (interface traps, leakage, oxide integrity). Meanwhile, SiC's defect spectrum (e.g., BPDs, stacking faults) drives a stronger pull for inspection + classification + feedback earlier in the flow to reduce downstream scrap of high-value processed wafers.

The current industry posture is moving from "materials bottleneck" to "manufacturing system competition," where tool value is measured by throughput "yield" repeatability "cost-of-ownership" rather than single-step capability. A second structural driver is the accelerating transition toward 200 mm SiC manufacturing, which triggers a new capex cycle across epitaxy, thermal, metrology, and cleaning. Public disclosures illustrate this clearly: Infineon explicitly references shifting SiC manufacturing to 200-mm wafers; ST announced a high-volume 200-mm SiC manufacturing facility in Catania; and Wolfspeed continues to position 200-mm materials/device scaling as central to its roadmap. On the equipment side, AIXTRON's G10-SiC shipment milestone explicitly ties demand to ramping 200-mm SiC epitaxy capacity, highlighting high-throughput epitaxy as a key expansion lever.

Looking forward, equipment growth is driven by (i) electrification and energy-efficiency

demand from EV (incl. 800V architectures), renewables/storage, industrial power and grid, sustaining SiC capacity build-outs; (ii) the industry pivot from capacity to cost curve reduction, pushing tool roadmaps toward higher wafer output per m², longer stable runs, and deeper automation/SPC; and (iii) three practical 'battlefields' for tool innovation: wafering/surface finishing (damage/kerf reduction), epitaxy (defectivity + throughput), and implant/anneal/oxidation/clean (high-temperature capability with ultra-low contamination). Along the chain, upstream consumables and critical parts (hot-zone materials, process gases/chemicals, chamber materials/coatings) increasingly co-evolve with tool design; midstream equipment suppliers differentiate via integrated process windows and service uptime; and downstream SiC substrate/epi/device makers require faster qualification loops, making joint development and platform standardization more common in the 200-mm era.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for SiC Semiconductor Processing Equipment and breaks down the forecast by Equipment 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 SiC Semiconductor Processing Equipment.

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

Segmentation by Equipment Type:

- SiC Crystal Growth Furnace
- SiC Cutting Equipment
- SiC Epitaxy/HTCVD Equipment
- SiC Grinding/CMP Equipment
- SiC Deposition Equipment
- SiC Thermal Processing Equipment
- SiC Etch and Clean Equipment
- SiC Ion Implant Equipment
- SiC Patterning Equipment
- SiC Metrology and Inspection Equipment
- SiC Wafer Bonders
- Others

Segmentation by SiC Wafer Size:

- 150mm SiC Equipment
- 200mm SiC Equipment
- Others

Segmentation by Device Type:

SiC MOSFET

SiC Diode

Others

Segmentation by Application:

Silicon Carbide Wafer

Silicon Carbide Epitaxial Wafer

Silicon Carbide 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.

Applied Materials

KLA SPTS

Lam

Tel

Axcelis

Centrotherm

ULVAC

PVA TePla

NAURA

Kokusai

SCREEN

Sumitomo

Nissin Ion

Oxford Instruments

ASML

Nikon

Canon

AIXTRON

ASM/LPE

Accretech

DISCO

Okamoto

Lasertec

Advantest

Teradyne

Crystal Growth & Energy Equipment Inc.

Han's Laser Technology Industry

Beijing TSD Semiconductor Co., Ltd.

Shenzhen Naso Tech

Beijing U-Precision Tech

AMIES Technology

Gurui Semiconductor Equipment (Guangzhou)

Angkun Vision (Beijing) Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global SiC Semiconductor Processing Equipment market?

What factors are driving SiC Semiconductor Processing Equipment market growth, globally and by region?

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

How do SiC Semiconductor Processing Equipment market opportunities vary by end market size?

How does SiC Semiconductor Processing Equipment break out by Equipment Type, by Application?

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