

**Semiconductor Manufacturing Equipment Market by Lithography, Wafer Surface Conditioning, Etching, CMP, Deposition, Wafer Cleaning, Assembly & Packaging, Dicing, Bonding, Metrology, Wafer/IC Testing, Logic, Memory, MPU, Discrete - Global Forecast to 2029**

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**Report description:**

The semiconductor manufacturing equipment market is projected to reach USD 155.09 billion by 2029 from USD 109.24 billion in 2024 at a CAGR of 7.3% during the forecast period. The major factors driving the growth of the market are expansion of semiconductor fabrication facilities, surge in automotive semiconductor market, and increasing demand for advanced and efficient chips. Further, advancements in advanced packaging technologies and increasing government support for domestic semiconductor industry are some new growth avenues for market participants. Large-scale expansions within fab centers, the dependence of rising cloud computing and change to electric, connected vehicle configurations make up the semiconductor manufacturing equipment market. All this is backed by much energy-efficient manufacture, advance regarding advanced semiconductor manufacturing facilities, and more pressure from smaller chips. It inspires innovation and scaling of production, resulting in increased usage of semiconductor manufacturing equipment in other industries as well.

"Lithography to register the largest market share in semiconductor manufacturing front-end equipment segment during the forecast period."

Advances in EUV technology and increasing investment in high-precision equipment for handling the challenges will be key drivers of the lithography segment in the front-end equipment market of semiconductor manufacturing equipment, accounting for a significant share. Lithography is one of the principal semiconductor fabrication processes of patterning intricate circuit patterns at microscopic resolution on silicon wafers. This step places the IC layout onto the surface of the wafer with light or electron beams imitating extremely minute features. Advances in the technology, most specifically in EUV lithography, provide a pathway to fabricate chips that are smaller and more powerful. Companies such as ASML (Netherlands) use EUV lithography, a process

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employing shorter wavelengths of light to fabricate features down to 5nm.

"Bonding to account for the highest CAGR in back-end equipment segment during the forecast period."

The bonding segment of the semiconductor manufacturing equipment market is expected to grow the most due to the increasing requirement for the precise semiconductor devices and for the processes of high yield and efficiency of production. Bonding equipment is needed in the formation of electrical interconnections between semiconductor dies and their packages or substrates so that semiconductor devices can function. Some generally used techniques include wire bonding, ball bonding, and solder bump bonding. The right bonding technology will make all the difference in either performance or cost-effectiveness in the semiconductor manufacturing process. Growth in the development of advanced semiconductor packaging technology and demand for cost-effective, high-reliability automotive and consumer-electronics components are driving demand for bonding equipment.

"Asia Pacific to register the fastest growth during the forecast period."

The highest CAGR is expected to be registered in the Asia Pacific region, which has the highest presence of leading semiconductor manufacturing equipment providers in key countries such as China, Japan, Taiwan, and South Korea, that ascertain dominance in semiconductor production and innovation in this region. The region has advanced production capabilities and a substantial consumer electronics sector. In addition, the growing government initiatives, the relentless advances in technology, and the substantial investments of local and international players. The increasing semiconductor need across consumer electronics, automotive, and telecommunications contribute to increasing growth. The concentration on innovative culture and infrastructure development is also a driving factor in the region's competitive position in the global market. The high growth is attributed to technological advancements in artificial intelligence (AI), Internet of Things (IoT), and 5G. The region is characterized with the robust manufacturing of consumer electronics and high demand for electronic appliances and electric vehicles, which basically calls for a huge need for a reliable as well as performance semiconductor manufacturing equipment.

The break-up of the profile of primary participants in the semiconductor manufacturing equipment market-

-□By Company Type: Tier 1 - 25%, Tier 2 - 35%, Tier 3 - 40%

-□By Designation Type: C Level - 40%, Director Level - 30%, Others - 30%

-□By Region Type: Asia Pacific - 45%, Americas - 35%, Europe, Middle East & Africa - 20%

The major players in the semiconductor manufacturing equipment market with a significant global presence include Applied Materials, Inc. (US), ASML (Netherlands), Tokyo Electron Limited (Japan), Lam Research Corporation (US), KLA Corporation (US), and others.

#### Research Coverage

The report segments the semiconductor manufacturing equipment market and forecasts its size by front-end equipment, back-end equipment, product type, dimension, supply chain participant, and region. It also provides a comprehensive review of drivers, restraints, opportunities, and challenges influencing market growth. The report covers qualitative aspects in addition to quantitative aspects of the market.

#### Reasons to buy the report:

The report will help the market leaders/new entrants in this market with information on the closest approximate revenues for the overall semiconductor manufacturing equipment market and related segments. This report will help stakeholders understand the competitive landscape and gain more insights to strengthen their position in the market and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

-□Analysis of key drivers (expansion of semiconductor fabrication facilities, surge in automotive semiconductor market, and increased demand for advanced and efficient chips), restraints (high capital investment requirements and complexity of manufacturing processes), opportunities (expansion of advanced packaging technologies and government support for domestic semiconductor industry), and challenges (rapid pace of technological advancements and environmental and regulatory

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compliance in manufacturing)

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new solution and service launches in the semiconductor manufacturing equipment market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the semiconductor manufacturing equipment market across varied regions.
- Market Diversification: Exhaustive information about new solutions and services, untapped geographies, recent developments, and investments in the semiconductor manufacturing equipment market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and solution and service offerings of leading players, including Applied Materials, Inc. (US), ASML (Netherlands), Tokyo Electron Limited (Japan), Lam Research Corporation (US), and KLA Corporation (US).

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