

Asia-Pacific Semiconductor Etch Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Semiconductor Etch Equipment Market is expected to register a CAGR of 4.42% during the forecast period.

Key Highlights

- Automotive applications and the integration of IoT, AI, & connected devices across multiple end-use verticals will likely increase the demand for various types of semiconductors. The region has many semiconductor manufacturing companies with the latest technologies. By this, Asia-Pacific has become a worldwide manufacturing powerhouse for semiconductor Etch Equipment. For instance, China is moving significantly closer to self-reliance in 7nm chip production. China has made breakthroughs in its 7nm chip-making process, reportedly developing tools and know-how for several segments of the manufacturing process amid efforts to reduce reliance on foreign equipment and material vendors.
- Various countries in this region are focused on encouraging semiconductor etch equipment manufacturing through government policies offering tax breaks, money, subsidies, and other forms of assistance. Made in China 2025 and make in India programs promote manufacturing and other high-tech businesses in the region. For instance, according to the government, the Indian semiconductor sector, which is presently valued at USD 15 billion, is predicted to grow to USD 63 billion by 2026. Through governmental intervention in the manufacturing of semiconductors and the peripheral sector, India will become a lead country in global semiconductor supply chains. The government invites companies from all over the world to explore establishing facilities in the country.
- The new semiconductor acts in North America and Europe to manufacture the chips in their regions, creating a break in the growth of the semiconductor and allied sectors in the APAC region. Being a major manufacturing region and a global supplier of semiconductor chips, Asia-Pacific faces challenges in terms of business loss. For instance, Canada has announced that two of China's largest telecom equipment manufacturers, Huawei and ZTE, will be prohibited from working on its 5G phone networks. This business loss will negatively impact the Semiconductor Etch Equipment market in the region.

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- COVID-19 has negatively influenced the market, causing supply chain and production disruptions in the semiconductor industry. The impact on semiconductor etch equipment makers was particularly severe because of labor shortages. Several companies in the semiconductor supply chain worldwide were forced to reduce or even discontinue operations during the pandemic. A large supply chain gap resulted from the sector's substantial deficit and rising demand.

APAC Semiconductor Etch Equipment Market Trends

Power devices is expected to grow in the market

- Power devices leverages the features of solid-state electronics for the control and conversion of electric power. These electronic devices can be directly used in the power processing circuits to control or convert electric power. These devices are primarily used as switches or rectifiers in circuits and systems and have become a key component of power electronics technology.
- With the demand for high-power devices increasing in several electronics applications, including the industrial, automotive, data center, and energy industries, the Power devices manufacturing industry is expected to witness significant growth.
- For instance, in March 2021, Toshiba Electronic Devices & Storage Corporation announced the expansion of the production capacity for power devices with the construction of a 300-millimeter wafer fabrication facility at Kaga Toshiba Electronics Corporation in Japan.
- Similarly, in February 2022, German chipmaker Infineon Technologies unveiled its plans to invest more than EUR 2 billion in a new frontend fab in Kulim, Malaysia. Considering the growing demand, the company has been increasing investments in expanding its manufacturing capacity for GaN and SiC to maintain its position across the entire range of power semiconductors.
- Such instances also create a favorable market scenario for the studied market, as etching is a key step in the manufacturing process of power devices. Furthermore, it is also driving innovations in the studied market as the equipment manufacturers are increasing their investments in R&D to meet the evolving demand of their customers.

China is expected to hold the major market share in the APAC region

- China is witnessing multiple investments from various companies, including TSMC, as well as local companies such as Huawei, which are entering into producing their chips as the US embargo has made it significantly difficult for Huawei to buy chips, so it has no other alternative but to develop the capability to manufacture for itself.
- In May 2021, TSMC will invest USD 2.8 billion in China to ramp up auto chip production and build new Nanjing facilities amid severe shortages. Whereas Huawei intends to produce chips based on the 45nm manufacturing process, where the fab will not be a solution for its smartphones, it may make networking chips for Huawei's 5G kit by 2022.
- The rising demand for electric vehicles fuels the rapid expansion of the APAC automotive semiconductor industry. Automobile manufacturers will continue to innovate, create, and develop self-driving cars, attracting various customers in key automotive manufacturing countries.
- The growing fully-autonomous automobiles are heavily influenced by technological advancements, consumer willingness to accept fully-automated vehicles, pricing, and suppliers' and OEMs' capacity to address significant concerns about vehicle safety. According to these factors, the automotive and semiconductor industries are always concentrating on enhancing technologies, negotiating raw material prices, and finally combining cars with reliable technology.

APAC Semiconductor Etch Equipment Industry Overview

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The Asia-Pacific semiconductor etch equipment market is very competitive, and only a few key players contribute to the significant market share. Due to the significant capital required to enter this market, it is difficult for new entrants. Various companies are exploring various strategies such as product innovation, expansions, developments, mergers, and acquisitions to enhance their market domination.

- May 2022: ENF Technology, a Korean company, is preparing to establish hydrofluoric acid manufacturing facilities by investing KRW 51.2 billion in its Cheonan factory. Hydrofluoric acid is a raw hydrogen fluoride chemical used to cut circuits and eliminate contaminants during semiconductor manufacturing. Semiconductor manufacturers such as Samsung Electronics and SK Hynix use it in wafers' etching and washing operations.
- May 2022: To address the growing demand for electrification goods, Hitachi announced that mass production of electric car inverters has begun at its Miyagi No.4 Plant in Murata, Miyagi Prefecture. Electric vehicles are in high demand worldwide because of their critical role in helping governments achieve carbon neutrality and reduce carbon emissions. Hitachi has increased its manufacturing capabilities and product line-up of fundamental components for electric vehicles, such as motors and inverters, to address this growing demand by forming manufacturing subsidiaries.
- Jan 2021: ULVAC, Inc., a Japanese company, announced the launch of the uGmni Series cluster system that combines deposition and etch modules. This enables the customers to equip a range of process modules, including sputter, etch, CVD, and others on the same transfer core. The company has also begun to sell production systems using this new platform.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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