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

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

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Report description:

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

Key Highlights
- The Semiconductor Etch Equipment market in Europe is dependent on expanding the in-house semiconductor manufacturing to avoid the global supply chain gap. European Union is considering building advanced semiconductor factories in Europe to avoid relying on the U.S. and Asia to supply semiconductors and peripheral components. The EU explores how to produce semiconductors with features smaller than 10 nm and eventually down to 2 nm chips. For instance, the EU has announced a significant subsidy program for semiconductors and will contribute EURO 11 billion in public money for semiconductor research, design, and production under the EU Chips Act to mobilize EURO 43 billion in public and private investment by 2030.
- The region is witnessing high growth in 5G wireless systems, connected cars, and high-performance computing markets as a developed economy. Usage of semiconductors is essential for all the above-said markets, and thus the semiconductor etch equipment market is growing in the region indirectly. For instance, Samco, a leading provider of plasma processing equipment for the compound semiconductor industry, has announced the installation of a plasma etch system and a UV ozone cleaning system at Samco-ucp ltd in Liechtenstein.
- Industrial automation in Europe is also propelling the growth of semiconductor manufacturing in Europe. For instance, Intel has chosen Germany as the location for a massive new chipmaking complex, revealing the first details of a USD 88 billion investment drive throughout Europe to reduce reliance on imports and alleviate a supply shortage for manufacturers.
- Raw material and component providers are relocating outside the EU for various reasons, including avoiding complying with stringent environmental regulations such as REACH (restriction and authorization). Any migration of raw material processing factories and component manufacturing outside the EU destabilizes the established supply networks in a specific EU region. Creating a new supplier ecosystem increases chip makers' expenses of doing business and increases supplier uncertainty.

Furthermore, the restrictions on using certain chemical compounds in the region may limit design flexibility and innovation potential. These are the challenges for the European Semiconductor Etch Equipment market to grow.
- COVID-19 has negatively influenced the European Semiconductor Etch Equipment market, causing supply chain and production disruptions in the semiconductor sector. The impact on semiconductor etch equipment manufacturers was particularly severe due to labor shortages. Companies in the semiconductor supply chain worldwide were forced to reduce or even discontinue operations during the pandemic. Because semiconductors are required for industries such as automobiles, the sector has been plagued by a significant deficit and rising demand, resulting in a massive supply chain gap in the region.

Europe Semiconductor Etch Equipment Market Trends

The Governments and EU Chips Act strategies for the manufacturing of in-house semiconductors and peripheral products to avoid the global supply chain gap is driving the market.

- The European Chips Act intends to boost Europe's competitiveness and resilience in semiconductor technologies and applications and facilitate the region's digital and green transformation. To have sustainable growth in the region, the EU has planned a blueprint to develop the whole value chain in the region, including the semiconductor etch equipment manufacturer. Many countries in the region have started working on the strategy; for instance, the government of the United Kingdom is seeking industry feedback on the condition of the domestic semiconductor industry and its ability to provide chips.
- The Economy Minister of Germany has stated that Germany is willing to invest EUR 3 billion in the initiative "Important Projects of Common European Interest," which is the EU's key subsidy tool to stimulate investment and reduce dependence on imports. The German government intends to invest the money to establish new semiconductor manufacturing plants. This investment is primarily focused on decreasing the dependency on semiconductor imports for future semiconductor needs.
- Universities, governments, and companies are working collaboratively to develop new etching technology for semiconductors in the region. For instance, The Wales Government has funded a project led by Swansea University and involves partners to create world-leading semiconductor process technology. Some of the applications are autonomous vehicles, new clean energy devices, future mobility, artificial intelligence, advanced packaging, biosensors, and wearable sensors. SPTS Technologies (a KLA company), IQE, The Compound Semiconductor Centre (CSC), Biovici, BioMEMS, Swansea and Cardiff universities, and Integrated Compound Semiconductors Ltd are among few partners in the ASSET (Application Specific Semiconductor Etching).
- In-house manufacturing of semiconductors and allied sectors are developing in the region. Start-up funding is increasing in Europe by virtue of the supporting governmental policies. For instance, Almi Invest is putting about SEK 3 million into AlixLabs, which is working on a new way of making semiconductor components that is both cheaper and faster. AlixLabs of Lund, Sweden, has invented Atomic Layer Etch Pitch splitting, a new, revolutionary technology for manufacturing semiconductor components that removes many phases in the manufacturing process.

The application of multi-functional advanced semiconductor chips in industrial Automations is driving the semiconductor Etch Equipment Market in the Region.

- Companies in the European region are transforming by implementing automation in their industries. In this automation process application of semiconductors is essential and thus drives the semiconductor etch equipment market in the region. Industrial alliances are trending in the EU for Semiconductor Technologies and Processors sectors.
- The alliance's goal is to identify existing gaps and technological developments needed to improve the competitiveness of enterprises and research and technology organizations working in the industry in the EU, particularly smaller European players. In a concentrated industry, this cooperation aids organizations in overcoming entrance obstacles, achieving critical mass, and

reducing dependency.
- Many global semiconductor manufacturers are interested in developing highly functional industrial semiconductors in the European region because of the opportunity to become a complete solution provider to the companies in the region in their automation process. For example, Infineon Technologies announced that it plans to start manufacturing at its new chip plant in Villach, Austria, where it also maintains its power semiconductor competence center. The business developed power semiconductor manufacture on 300mm thin wafers here and later expanded into fully automated high-volume production in Dresden, Germany. For this manufacturing unit, etching equipment would be required, directly or indirectly increasing the European Semiconductor Etch Equipment market.
- Semiconductors with emerging technology functionality are the building blocks of Industrial Automation. The region is gearing up with huge investment in manufacturing high-tech semiconductor manufacturing units. For example, Bosch, a German engineering and technology firm, has completed a new semiconductor plant in Dresden fully networked with 5G mobile technology. Bosch had put roughly EURO 1 billion into the high-tech facility, making it the company's most significant single investment in its 130-year history. Requirement for various semiconductor etching equipment is essential for manufacturing the semiconductor chips.

Europe Semiconductor Etch Equipment Industry Overview

The trend in the semiconductor etch equipment market is consolidated owing to the presence of a few players dominating the market. The significant capital required to enter this market has become a barrier for new entrants. The key players are focusing more on product innovation, mergers, and acquisitions, among other strategies, to hold a significant market share in the Europe market.

- March 2022: Intel invests about USD 13 billion to improve and expand its fabs in Leixlip, Ireland. The chipmaker plans to accommodate Intel 4 process (previously known as 7 nm) in the upgraded plant. The project is currently underway, with output expected to begin in 2023.
- April 2022: 3M's semiconductor coolant plant in Belgium has been closed indefinitely whose products were used in semiconductor etching processes. The plant accounts for 80 percent of the global semiconductor coolant output.
- June 2022: Collaudi Elettronici Automatizzati, an Italian manufacturer of power test equipment, has been acquired by Advantest in Japan (CREA). CREA is a leading supplier of power semiconductor test equipment, having extensive experience in the design and manufacture of test equipment for power semiconductors. Advantest will be able to offer a greater range of test and measurement solutions to a broader range of customers in high-growth industries because of this acquisition.

Additional Benefits:

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

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