

Semiconductor Wafer Polishing and Grinding Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Semiconductor Wafer Polishing and Grinding Equipment Market is expected to register a CAGR of 4.1% during the forecast period.

Key Highlights

- The increasing demand in MEMS, IC manufacturing, optics, and compound semiconductors will boost the planarization in semiconductor devices. In the current market scenario, as almost all electronic devices, including laptops, smartphones, computers, etc., make use of Silicon ICs and other wafer-dependent packages, the demand for advanced grinding and polishing machinery is always on the rise.
- According to SEMI, silicon wafer shipments across the world in the second quarter of 2022 saw a 5% growth reaching 3,704 million square inches from 3,534 million square inches reported during the same quarter in the previous year. Such a market scenario is expected to unlock several new opportunities for the market in the near future.
- Further, the growing need for miniaturization in electronics (due to the demand for thinner wafers that consume low power) is expected to drive some advancements in the semiconductor wafer polishing and grinding equipment market over the forecast period.
- However, the recent advancements in etching, which offer more advantages compared to polishing techniques, are affecting the demand for polishing machinery. Moreover, the removal of partial defects through polishing with traditional CMP (chemical-mechanical-polishing) technology preserves the surface profile, making it extremely difficult for manufacturers and service providers involved in wafer reclaim activities.
- Covid-19 significantly disrupted the supply chain and production of semiconductors worldwide, especially in China, during the initial phase of 2020. However, the rising trends of digitalization due to the pandemic have increased the demand for semiconductor components, which is expected to have a positive impact on the market going forward.

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Semiconductor Wafer Polishing and Grinding Equipment Market Trends

Growing Consumption of Consumer Electronics is Expected to Positively Impact the Market

- The technological advancements in consumer electronic devices, such as smartphones and tablets, and the development of smart home devices and wearables globally are driving the need for small integrated circuits. This, in turn, is fueling the demand for wafer polishing and grinding equipment, which plays a crucial role in the semiconductor wafer fabrication process.
- The overall demand for the semiconductor materials market is being driven by smartphones and other applications across consumer electronics, automotive applications, etc. These industries have been inspired by technology transitions such as wireless technologies (5G), Artificial intelligence, etc. Also, the trend of increasing numbers of Internet of Things (IoT) devices is expected to force the semiconductor industry to invest in this equipment, in a bid to attain intelligent products.
- Every smartphone is comprised of a System On a Chip (SoC), which is an integrated circuit that integrates all or most components of a computer or other electronic system. SoC chips are typically fabricated using metal-oxide-semiconductor (MOS) technology and are sent to a wafer fabrication plant to create the SoC dice before packaging and testing where wafer polishing and grinding is done. As such, the growing penetration of smartphones is expected to have a positive impact on the market.
- Further, microelectronic devices have significantly permeated consumer electronics. The application of microelectronics has helped in the design of devices that are attached to the human body. Owing to this implementation, wristbands, wearable displays, and wearable healthcare products have been designed to monitor an individual's well-being. Chemical-mechanical polishing, as a key technology in the production and processing of silicon wafers, has helped in the realization of state-of-the-art microelectronic devices and micro-electro-mechanical systems (MEMS).
- Moreover, there is an emergence of electronic innovations that are becoming more powerful in performance yet lighter in weight than their predecessor. As such, for more components to fit into such devices, the semiconductors have to be smaller, tightly packed, and lighter in weight to reserve space for other elements to fit in as well. Thus, wafer grinding is a critical process for the manufacturing of semiconductors.

North America is Expected to Hold Significant Share

- Over the years, the United States semiconductor industry has maintained its leadership position in terms of the global sales market share. The country is also one of the major innovators in semiconductor packaging, boasting many wafer fabrication plants spread across different states. Some major fabless companies in this region include Broadcom, AMD, Qualcomm, Apple, Marvell, Xilinx, and NVIDIA.
- The region is likely to remain one of the major revenue contributors to the market studied over the forecast period, as fabless companies (indirect), integrated device manufacturers, and factories are increasing several activities for semiconductor wafer manufacturers.
- Moreover, the proliferating consumer electronics industry in the region is also an important factor driving the growth of the market. For instance, according to CTA, the consumer electronics industry in the region is projected to generate over USD 505 billion in retail sales revenue in 2022, representing a 2.8% revenue increase from 2021's impressive 9.6% growth over 2020.
- The demand for wafers is also due to the rise of power semiconductors ICs for automotive applications. Increasing investments in electric infrastructure and an increasing number of charging stations are boosting the growth of the semiconductor market in the US. The region is also home to some of the major automotive players in the world, which are investing in the electric car segment.
- As per the US DoE, EV sales grew by 85% from 2020 to 2021, while sales of plug-in hybrid electric vehicles (PHEVs) more than

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doubled in 2021, with an increase of 138% over the previous year. Semiconductors form a core element of the EV landscape for electrified powertrain components like chargers, DC to DC inverters, and traction drive inverters.

Semiconductor Wafer Polishing and Grinding Equipment Industry Overview

The semiconductor wafer polishing and grinding equipment market is moderately consolidated and consists of certain major players. The market has gained a competitive edge over the past two decades. In terms of market share, few major players dominate the market, currently. Various vendors are continually updating their existing equipment for better efficiency.

- June 2022 - Applied Materials announced that it had acquired Picosun Oy, a privately held semiconductor equipment company based in Finland. The acquisition was expected to broaden the Applied ICAPS (IoT, Communications, Automotive, Power and Sensors) product portfolio and customer engagements.
- February 2022 - Revasum announced that it had secured a growth capital facility from SQN Venture Partners, LLC. The facility would provide up to USD 8 million in debt financing to accelerate new product development and provide working capital to support rapid growth.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Threat of New Entrants

4.2.2 Bargaining Power of Buyers

4.2.3 Bargaining Power of Suppliers

4.2.4 Threat of Substitute Products

4.2.5 Intensity of Competitive Rivalry

4.3 Industry Value Chain Analysis

4.4 Assessment of COVID-19 impact on the industry

4.5 Market Drivers

4.5.1 Growing Consumption of Consumer Electronics

4.5.2 Increasing Need for Miniaturization of Semiconductors

4.6 Market Challenges

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4.6.1 Complexity Regarding Manufacturing

5 MARKET SEGMENTATION

5.1 Geography

5.1.1 North America

5.1.2 Europe

5.1.3 Asia Pacific

5.1.4 Rest of the World

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles*

6.1.1 Applied Materials Inc.

6.1.2 Ebara Corporation

6.1.3 Lapmaster Wolters GmbH

6.1.4 Logitech Ltd

6.1.5 Entrepix Inc.

6.1.6 Revasum Inc.

6.1.7 Tokyo Seimitsu Co. Ltd (Accretech Create Corp.)

6.1.8 Logomatic GmbH

6.1.9 Disco Corporation

6.1.10 Komatsu NTC Ltd

6.1.11 Okamoto Corporation

7 INVESTMENT ANALYSIS

8 FUTURE OF THE MARKET

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