

Global Laser Direct Imaging (LDI) in PCB Manufacturing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Laser Direct Imaging (LDI) in PCB Manufacturing market size is expected to reach \$ 1388 million by 2032, rising at a market growth of 2.7% CAGR during the forecast period (2026-2032).

In 2025 the global Laser Direct Imaging (LDI) Equipment sales were 2,407 (Units) and The average selling price is 467 K USD/Unit.

The Laser Direct Imaging (LDI) Equipment offers auto focus capabilities so that the system can handle different thicknesses of material and rapid job change-overs without expensive tooling. Using LDI to create the circuit traces gives the PCB manufacturers a lot of advantages, most of them pertaining to weaknesses of using a Photo-tool. Eliminating the need of a Photo-tool removes alignment issues, light refraction issues, and those imperfections related to environmental variations. Also, with LDI, PCB factories can achieve the development of images that require more precision, and resolution, due to the computer's enhanced optical alignment, that automatically compensates distortion on the materials. Changes to the required images, are also easier to achieve with LDI: with the traditional approach, the smallest mistake on the Photo-tool, required the factory to produce a new one, wasting time and money; however, with LDI, these changes became a matter of updating the design file, which can be done more consistently and cost-effectively.

Core driving factor

The demand for 5G and high-end PCBS: The demand for multi-layer and high-speed PCBS has driven the penetration rate of LDI in the mid-to-high-end manufacturing

sector (currently over 60%).

Emerging application expansion: Accelerating the application of technologies in scenarios such as MiniLED, IC substrate, and precision processing of new energy vehicle batteries.

Policy support: China's special policies and tax incentives for intelligent manufacturing promote the process of domestic production.

Technological iteration direction

High precision and intelligence: The domestic production rate of optical systems has increased (currently about 50%), but high-power ultraviolet laser modules still rely on imports. Digital control technology continues to upgrade.

Multi-material compatibility: Extended to the processing of metals, ceramics and other materials, meeting the demands of aerospace, medical and other fields.

Competitive situation

International dominance: International enterprises such as Orbotech hold 81% of the global market share, while Chinese manufacturers like XGI Microelectronics and Han's CNC are accelerating their pursuit.

Domestic substitution space: China has a high dependence on imported high-end equipment, and domestic enterprises focus on breakthroughs in core components (such as Ruike Laser).

Industrial chain synergy

Upstream breakthrough: The localization of lasers and optical components is accelerating, but key modules still need to be imported.

Downstream demand differentiation: Semiconductor packaging and new energy batteries have become key investment areas.

Risks and Challenges

Risk of technological substitution: Traditional exposure processes still have cost

advantages, while new display technologies may engage in cross-industry competition.

External uncertainties: Be vigilant about the risks of fluctuations in raw material prices, international trade barriers and technological blockades.

This report studies the global Laser Direct Imaging (LDI) in PCB Manufacturing production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Laser Direct Imaging (LDI) in PCB Manufacturing and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Laser Direct Imaging (LDI) in PCB Manufacturing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Laser Direct Imaging (LDI) in PCB Manufacturing total production and demand, 2021-2032, (K Units)

Global Laser Direct Imaging (LDI) in PCB Manufacturing total production value, 2021-2032, (USD Million)

Global Laser Direct Imaging (LDI) in PCB Manufacturing production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Laser Direct Imaging (LDI) in PCB Manufacturing consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Laser Direct Imaging (LDI) in PCB Manufacturing domestic production, consumption, key domestic manufacturers and share

Global Laser Direct Imaging (LDI) in PCB Manufacturing production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Laser Direct Imaging (LDI) in PCB Manufacturing production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Laser Direct Imaging (LDI) in PCB Manufacturing production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Laser Direct Imaging (LDI) in PCB Manufacturing market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include KLA(Orbotech), CFMEE, YS Photech, SCREEN, ORC, Mikoptik, Aiscent, ADTech,

Manz, Han's CNC, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Laser Direct Imaging (LDI) in PCB Manufacturing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Laser Direct Imaging (LDI) in PCB Manufacturing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Laser Direct Imaging (LDI) in PCB Manufacturing Market, Segmentation by Type:

Polygon Mirror 365nm

DMD 405nm

Global Laser Direct Imaging (LDI) in PCB Manufacturing Market, Segmentation by Resolution:

High-resolution LDI

Medium-resolution LDI

Low-resolution LDI

Global Laser Direct Imaging (LDI) in PCB Manufacturing Market, Segmentation by Mechanical Structure:

Flatbed Platen

External Drum

Global Laser Direct Imaging (LDI) in PCB Manufacturing Market, Segmentation by Application:

HDI and Standard PCB

Thick-Copper and Ceramic PCB

Oversized PCB

Display

Semiconductor

Companies Profiled:

KLA(Orbotech)

CFMEE

YS Phototech

SCREEN

ORC

Mikoptik

Aiscent

ADTech

Manz

Han's CNC

Anhui Disking Opto-Electric

Via Mechanics

Guangdong Siwo advanced equipment

Delphi Laser

Limata

TZTEK

Key Questions Answered:

1. How big is the global Laser Direct Imaging (LDI) in PCB Manufacturing market?
2. What is the demand of the global Laser Direct Imaging (LDI) in PCB Manufacturing market?
3. What is the year over year growth of the global Laser Direct Imaging (LDI) in PCB Manufacturing market?
4. What is the production and production value of the global Laser Direct Imaging (LDI)

in PCB Manufacturing market?

5. Who are the key producers in the global Laser Direct Imaging (LDI) in PCB Manufacturing market?

6. What are the growth factors driving the market demand?

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