

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market size was valued at US\$ 1729 million in 2025 and is forecast to a readjusted size of US\$ 3568 million by 2032 with a CAGR of 10.6% during review period.

Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging refers to specialized laser-based manufacturing tools used in back-end semiconductor assembly, wafer-level packaging, advanced packaging, power device packaging, and package substrate processing. These systems apply UV, IR, green, picosecond, femtosecond, or other laser beams, together with beam delivery optics, precision motion platforms, machine vision alignment, automated handling, process control software, and clean processing modules, to perform non-contact and high-precision operations on silicon, SiC, GaN, GaAs, glass, molding compounds, low-k dielectric layers, metal wiring layers, package substrates, and packaged semiconductor devices. Typical equipment includes wafer laser dicing systems, laser grooving tools, stealth or modified laser dicing systems, wafer and package laser marking systems, strip/tray/wafer-level marking handlers, laser debonding tools, laser lift-off systems, TGV/TMV laser drilling tools, and laser-assisted bonding or soldering systems for advanced packaging. The core value of this equipment category lies in enabling low-stress singulation, narrow kerf width, high-throughput traceability, clean debonding, fine via formation, and scalable processing for thin wafers, heterogeneous integration, high-density interconnects, HBM, fan-out, and compound semiconductor packaging.

Based on our research, Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging should be understood as a specialized group of back-end process tools rather than a simple extension of general-purpose industrial laser systems. The market is driven by process requirements that are specific to semiconductor packaging, including thin-wafer handling, low-stress singulation, narrow kerf width, low particle contamination, permanent traceability, clean carrier separation, and high-density interconnect formation. Laser dicing, laser grooving, wafer and package laser marking, laser debonding, laser lift-off, and TGV/TMV laser drilling have become increasingly relevant as advanced packaging structures move toward thinner wafers, more complex material stacks, higher interconnect density, and stricter yield requirements. In this study, we adopt a narrow equipment revenue scope and include only complete equipment systems used in semiconductor assembly, wafer-level packaging, advanced packaging, and related package substrate processing. Front-end laser annealing, general PCB laser drilling, display and photovoltaic laser tools, laser sources, optics, and temporary bonding materials are excluded from the revenue model.

From a demand perspective, the growth logic is increasingly tied to AI infrastructure, high-performance computing, HBM, 2.5D/3D integration, fan-out packaging, compound semiconductors, and regional packaging capacity expansion. Advanced packaging increases the need for temporary bonding and debonding, fine laser grooving, carrier separation, and traceability at wafer, strip, tray, and package levels. SiC, GaN, GaAs, and other hard or brittle materials create additional process demand for non-contact, low-chipping laser singulation. At the same time, packaging capacity expansion in China, Taiwan, South Korea, Malaysia, Singapore, and other Asian regions is creating more room for local and regional equipment suppliers. This does not mean that laser tools will replace all mechanical or plasma-based processes, but it does indicate that laser processing will become a more important enabling layer for advanced and high-yield packaging flows.

From a technology roadmap perspective, the market is shifting from standalone laser tools toward integrated process platforms. Laser grooving and dicing systems are increasingly combined with coating, cleaning, automated wafer handling, vision alignment, and data communication modules. Laser marking systems are evolving toward higher-throughput strip, tray, and wafer-level traceability. Laser debonding and laser lift-off tools are moving toward larger substrates, better beam uniformity, lower thermal impact, and lower residue. The next phase of competition will be less about demonstrating laser-material interaction and more about delivering stable process windows, consumable-light operation, cleanroom-compatible automation, installed-base support, and qualification with leading OSATs, IDMs, foundries, and package substrate

makers.

This report is a detailed and comprehensive analysis for global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Tokyo Electron Limited, Coherent Corp., Keyence Corporation, MKS Instruments, Inc., DISCO Corporation, Han's Laser Technology Industry Group Co., Ltd., ASMPT Limited, HGTECH Co., Ltd., Maxwell Technologies Co., Ltd., ACCRETECH, etc.

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

Market Segmentation

Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Laser Dicing Equipment

Laser Grooving Equipment

Laser Marking Equipment

Laser Bonding / Soldering Equipment

Other

Market segment by Laser Technology

UV Laser Processing

IR Laser Processing

Green Laser Processing

Other Laser Technologies

Market segment by Equipment Automation Level

Manual Equipment

Semi-automatic Equipment

Fully Automatic Standalone Equipment

Market segment by Wafer / Substrate Size

4-inch and Below

6-inch

8-inch

12-inch

Customized Format

Market segment by Application

Wafer Singulation

Traceability Marking

Laser-assisted Joining

Other

Major players covered

Tokyo Electron Limited

Coherent Corp.

Keyence Corporation

MKS Instruments, Inc.

DISCO Corporation

Han's Laser Technology Industry Group Co., Ltd.

ASMPT Limited

HGTECH Co., Ltd.

Maxwell Technologies Co., Ltd.

ACCRETECH

EV Group

SUSS MicroTec SE

LPKF Laser & Electronics SE

EO Technics Co., Ltd.

Shin-Etsu Engineering Co., Ltd.

Suzhou Delphi Laser Co., Ltd.

DR Laser

3D-Micromac AG

Synova S.A.

InnoLas Semiconductor GmbH

Pentamaster Corporation Berhad

Genesem Inc.

PacTech ? Packaging Technologies GmbH

PowerTECH Co., Ltd.

Wisee Tec Co., Ltd.

FOBA Laser Marking + Engraving

OpTek Systems

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Laser Processing Equipment for

Semiconductor Assembly and Advanced Packaging, with price, sales quantity, revenue, and global market share of Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging from 2021 to 2026.

Chapter 3, the Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging.

Chapter 14 and 15, to describe Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging sales channel, distributors, customers, research findings and conclusion.

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