

Global PCB Dry Film Laminators Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PCB Dry Film Laminators market size is expected to reach \$ 166 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

PCB Dry Film Laminators are dedicated process equipment used in printed circuit board manufacturing to laminate dry film photoresist, dry film solder mask or other photosensitive functional films onto circuit board substrates. The equipment controls heat, pressure, roller transmission, film tension, automatic cutting, vacuum-assisted air removal and process recipes to achieve uniform adhesion and stable film transfer. It is typically used before exposure, development, etching, pattern plating, solder mask imaging and build-up processes. As circuit boards become thinner, denser, finer in line width and more reliability-oriented, dry film lamination equipment is evolving from basic manual systems toward semi-automatic, fully automatic, high-cleanliness, high-precision and inline production solutions.

In 2025, global PCB Dry Film Laminators production reached approximately 1264 units, with an average global market price of around US\$ 86 k per unit

The upstream supply chain of PCB Dry Film Laminators mainly includes structural metals and precision machined parts, heating rollers and pressure rollers, rubber rollers, belts, bearings, linear guides, ball screws, servo motors, drives, programmable controllers, sensors, pneumatic components, vacuum pumps, electrical cabinets, human-machine interfaces and control software. Representative suppliers include Nippon Steel, Baosteel, POSCO; NSK, SKF, IKO, etc.

Downstream applications include Rigid PCB manufacturing, FPC manufacturing, and HDI and IC Substrate Manufacturing. The representative customer names include TTM

Technologies, Unimicron Technology, Shennan Circuits, Nippon Mektron, Career Technology, Sumitomo Electric Printed Circuits, etc.

The overall gross margin of PCB Dry Film Laminators is generally at 30%-45%.

By type, PCB Dry Film Laminators are segmented into Manual Dry Film Laminators, Semi-automatic Dry Film Laminators and Fully Automatic Dry Film Laminators. Manual Dry Film Laminators are relatively simple in structure and rely heavily on operators for panel feeding, film loading, alignment and cutting. They are mainly used in research laboratories, education, prototyping, sample production and low-volume manufacturing, with advantages in low investment cost, flexibility and easy maintenance. Semi-automatic Dry Film Laminators integrate controlled heating, pressure adjustment, transport speed control and partial film handling, making them suitable for small and medium batch PCB production where users need better process stability without the full cost of an inline system. Fully Automatic Dry Film Laminators integrate automatic film unwinding, panel feeding, cutting, waste collection, pressure control, temperature control, recipe storage and production-line connectivity, making them the preferred solution for mass production, thin panels, fine-line boards, HDI boards and IC substrate manufacturing.

By application, PCB Dry Film Laminators are mainly used in Rigid PCB manufacturing, FPC manufacturing, and HDI and IC Substrate Manufacturing. Rigid PCB is the fundamental application area, where the equipment is used for inner-layer imaging, outer-layer imaging, etching masks and pattern plating masks, requiring uniform lamination, stable pressure, low bubble formation and precise film-edge control. FPC manufacturing requires stronger tension control, thin-film transport, wrinkle prevention and continuous processing capability, especially for thin flexible substrates and roll-based materials. HDI and IC Substrate Manufacturing imposes the highest requirements on cleanliness, pressure uniformity, temperature stability, vacuum lamination and defect control, driving the adoption of fully automatic, vacuum-assisted and high-precision laminating systems.

Market Driving Factors include the upgrading of the PCB industry toward finer lines and higher density, the miniaturization of electronic devices, growing demand from automotive electronics and communication equipment, capacity expansion in HDI and IC substrate manufacturing, automation replacing manual operations, the need for higher production yield, broader adoption of dry film photoresist and dry film solder mask, and stricter process stability requirements in advanced circuit board manufacturing. Consumer electronics, servers, communication base stations, new

energy vehicles, intelligent driving systems, industrial control and advanced packaging are increasing circuit board complexity, which strengthens the importance of precise and stable dry film lamination. At the same time, PCB manufacturers' demand for cost reduction, labor reduction, lower human error, higher traceability and flexible multi-product production supports the wider adoption of semi-automatic and fully automatic dry film laminators.

Market Restraints include relatively high equipment investment, cyclical capital expenditure in the downstream PCB industry, long customer qualification cycles, difficulty in matching different films and substrates, reliance on process know-how for maintenance and debugging, intense price competition in low-end equipment, and the continued preference of some small manufacturers for low-cost manual or semi-automatic systems. In HDI and IC Substrate Manufacturing, customers impose strict requirements on cleanliness, vacuum lamination, pressure uniformity and long-term stability, which raises entry barriers for new equipment suppliers. In addition, higher penetration of liquid solder mask, direct imaging, alternative functional films or other pattern-transfer processes in selected applications may create substitution pressure on part of the traditional dry film laminator demand.

This report studies the global PCB Dry Film Laminators production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PCB Dry Film Laminators 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 PCB Dry Film Laminators that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PCB Dry Film Laminators total production and demand, 2021-2032, (Units)

Global PCB Dry Film Laminators total production value, 2021-2032, (USD Million)

Global PCB Dry Film Laminators production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global PCB Dry Film Laminators consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: PCB Dry Film Laminators domestic production, consumption, key domestic manufacturers and share

Global PCB Dry Film Laminators production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global PCB Dry Film Laminators production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global PCB Dry Film Laminators production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global PCB Dry Film Laminators 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 C Sun Manufacturing Ltd., Dynachem Automatic Lamination Technologies s.r.l., MCK Co., Ltd., Top Range Machinery Co., Ltd., Shenzhen Xinguanghui Technology Co., Ltd., Beijing Golden Eagle Electronic Equipment Co., Ltd., Growns Electronic Technology Co., Ltd., Bungard Elektronik GmbH & Co. KG, Mohite Electronics Private Limited, 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 PCB Dry Film Laminators market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 PCB Dry Film Laminators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PCB Dry Film Laminators Market, Segmentation by Type:

Manual Dry Film Laminators

Semi-automatic Dry Film Laminators

Fully Automatic Dry Film Laminators

Global PCB Dry Film Laminators Market, Segmentation by Film Application Side:

Single-sided Dry Film Laminators

Double-sided Dry Film Laminators

Global PCB Dry Film Laminators Market, Segmentation by Lamination Width:

Narrow-width Dry Film Laminators

Standard-width Dry Film Laminators

Wide-width Dry Film Laminators

Ultra-wide Dry Film Laminators

Global PCB Dry Film Laminators Market, Segmentation by Application:

Rigid PCB (Printed Circuit Board)

FPC (Flexible Printed Circuit)

HDI and IC Substrate Manufacturing

Companies Profiled:

C Sun Manufacturing Ltd.

Dynachem Automatic Lamination Technologies s.r.l.

MCK Co., Ltd.

Top Range Machinery Co., Ltd.

Shenzhen Xinguanghui Technology Co., Ltd.

Beijing Golden Eagle Electronic Equipment Co., Ltd.

Growns Electronic Technology Co., Ltd.

Bungard Elektronik GmbH & Co. KG

Mohite Electronics Private Limited

Key Questions Answered:

1. How big is the global PCB Dry Film Laminators market?
2. What is the demand of the global PCB Dry Film Laminators market?
3. What is the year over year growth of the global PCB Dry Film Laminators market?
4. What is the production and production value of the global PCB Dry Film Laminators market?
5. Who are the key producers in the global PCB Dry Film Laminators market?
6. What are the growth factors driving the market demand?

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