

Global Soft Solder Die Attach Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Soft Solder Die Attach Equipment market size is expected to reach \$ 478 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Soft Solder Die Attach Equipment refers to specialized die bonding equipment used in power semiconductor packaging. It attaches singulated dies to leadframes, copper substrates, ceramic substrates, or power module substrates through tin based soft solder under controlled temperature, pressure, bonding time, and low oxygen or nitrogen atmosphere. A typical system consists of wafer loading and die picking modules, vision alignment, solder feeding, heated bonding stages, force control, low oxygen process control, leadframe or substrate handling, inspection, and process control software. The equipment supports solder wire, solder ribbon, solder preforms, and solder paste, and is mainly used for TO, DPAK, PDFN, power MOSFET, IGBT, diode, rectifier bridge, SiC power device, and selected power module packages. Major supply bases include the Netherlands, Singapore, China, Japan, Germany, and the United States, with demand mainly from power device IDMs, OSATs, and power module manufacturers.

In 2025, global Soft Solder Die Attach Equipment shipments reached approximately 260-340 units, while mainstream fully automatic production systems were typically priced at about USD 0.85-1.55 million per unit on an FOB basis. High end systems with 12 inch wafer compatibility, low oxygen control, and high speed leadframe handling were positioned near the upper end of the range. Driven by power semiconductor capacity expansion, vehicle electrification, industrial power supplies, photovoltaic inverters, and SiC device packaging demand, the market is expected to maintain moderate growth in 2026, although equipment procurement remains sensitive to the

semiconductor capital expenditure cycle, OSAT expansion schedules, and localization progress.

The global Soft Solder Die Attach Equipment market is entering a new phase of power semiconductor packaging upgrades. Vehicle electrification, charging infrastructure, photovoltaic and energy storage inverters, industrial power supplies, and data center power management are raising requirements for thermal performance and long term device reliability. As a result, soft solder die attach is expanding from conventional discrete power packages toward higher density, more consistent, and more automated mass production environments. For power MOSFETs, IGBTs, diodes, rectifier bridges, and selected SiC power devices, soft solder bonding continues to offer strong thermal conductivity, electrical conductivity, and manufacturing cost advantages. Upgrades in high speed leadframe handling, low oxygen process control, 12 inch wafer compatibility, vision inspection, and process traceability are becoming key competitive factors for equipment suppliers.

At the same time, the market faces clear technical and commercial constraints. Soft solder die attach equipment is a specialized packaging tool with a narrow process window, and customers impose strict requirements on solder formation, void control, oxidation management, die shift, solder layer uniformity, and long term reliability. Equipment qualification and customer validation cycles are therefore relatively long. Emerging alternatives such as silver sintering, copper sintering, advanced power module packaging, and high end eutectic bonding may replace traditional soft solder processes in selected high heat flux applications. However, in mid to high power discrete devices and mature power package segments, soft solder die attach remains economically attractive and technically well established. Future growth will be driven mainly by automotive grade power device capacity expansion, localization of packaging equipment, upgrades in Asian assembly capacity, and continued investment by leading OSATs in high throughput, automation, low oxygen control, and inline inspection capabilities.

This report studies the global Soft Solder Die Attach Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Soft Solder Die Attach Equipment 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 Soft Solder Die Attach Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Soft Solder Die Attach Equipment total production and demand, 2021-2032, (Units)

Global Soft Solder Die Attach Equipment total production value, 2021-2032, (USD Million)

Global Soft Solder Die Attach Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Soft Solder Die Attach Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Soft Solder Die Attach Equipment domestic production, consumption, key domestic manufacturers and share

Global Soft Solder Die Attach Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Soft Solder Die Attach Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Soft Solder Die Attach Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Soft Solder Die Attach Equipment 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 Wuxi Autowell Technology Co., Ltd., Shenzhen Liande Automation Equipment Co., Ltd., Shenzhen S-king Intelligent Equipment Co., Ltd., Shenzhen Colibri Technologies Co., Ltd., Quick Intelligent Equipment Co., Ltd., Jiangsu Himalaya Semiconductor Co., Ltd., BE Semiconductor Industries N.V., ASMPT Limited, Canon Machinery Inc., 3S Silicon Tech., Inc., 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 Soft Solder Die Attach Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 Soft Solder Die Attach Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Soft Solder Die Attach Equipment Market, Segmentation by Type:

Fully Automatic Inline Systems

Semi Automatic Production Systems

Others

Global Soft Solder Die Attach Equipment Market, Segmentation by End Use Industry:

Automotive and E Mobility

Industrial and Energy

Consumer Power Electronics

Communications and Computing

Global Soft Solder Die Attach Equipment Market, Segmentation by Solder Feeding Method:

Solder Wire Feeding Systems

Solder Preform Placement Systems

Solder Ribbon Feeding Systems

Solder Paste Dispensing Systems

Global Soft Solder Die Attach Equipment Market, Segmentation by Process Atmosphere:

Standard Nitrogen Atmosphere Systems

Enhanced Low Oxygen Control Systems

Vacuum Assisted Soldering Systems

Others

Global Soft Solder Die Attach Equipment Market, Segmentation by Application:

Leadframe Power Discrete Packages

Power Module Packages

Others

Companies Profiled:

Wuxi Autowell Technology Co., Ltd.

Shenzhen Liande Automation Equipment Co., Ltd.

Shenzhen S-king Intelligent Equipment Co., Ltd.

Shenzhen Colibri Technologies Co., Ltd.

Quick Intelligent Equipment Co., Ltd.

Jiangsu Himalaya Semiconductor Co., Ltd.

BE Semiconductor Industries N.V.

ASMPT Limited

Canon Machinery Inc.

3S Silicon Tech., Inc.

Palomar Technologies, Inc.

Mycronic AB

Finetech GmbH & Co. KG

SET Corporation SA

HYBOND, Inc.

TRESKY GmbH

F&S BONDTEC Semiconductor GmbH

AUTOTRONIK-SMT GmbH

Key Questions Answered:

1. How big is the global Soft Solder Die Attach Equipment market?
2. What is the demand of the global Soft Solder Die Attach Equipment market?

3. What is the year over year growth of the global Soft Solder Die Attach Equipment market?
4. What is the production and production value of the global Soft Solder Die Attach Equipment market?
5. Who are the key producers in the global Soft Solder Die Attach Equipment market?
6. What are the growth factors driving the market demand?

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