

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

<https://marketpublishers.com/r/G62E9D3F1A89EN.html>

Date: July 2026

Pages: 149

Price: US\$ 4,480.00 (Single User License)

ID: G62E9D3F1A89EN

Abstracts

The global Soft Solder Die Attach System market size is expected to reach \$ 492 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Soft Solder Die Attach System is an automated back end semiconductor packaging system used for die picking, vision alignment, placement, and metallurgical bonding with tin based soft solder. Under controlled temperature, bonding force, bonding time, and nitrogen or low oxygen atmosphere, the system picks singulated dies from wafers, films, or carriers and attaches them onto leadframes, copper substrates, ceramic substrates, or power module substrates. A typical system consists of wafer loading and die picking modules, vision alignment, solder feeding, heated bonding stages, force control, low oxygen process chambers, leadframe or substrate handling, inline inspection, and process control software. It 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 manufacturing 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 System shipments reached approximately 280-350 units, while mainstream fully automatic production systems were typically priced at about USD 0.85-1.50 million per unit on an FOB basis. High end systems with 12 inch wafer compatibility, high speed leadframe handling, low oxygen control, inline inspection, stable temperature control, and process traceability were positioned near the upper end of the range. In 2026, global shipments are expected to increase moderately, supported by power semiconductor capacity expansion, automotive grade device

packaging upgrades, SiC power device ramp up, and assembly capacity renewal in Asia, while mainstream pricing is expected to remain broadly stable with a rising share of premium configurations.

The global Soft Solder Die Attach System market is entering an upgrade cycle driven by power semiconductor packaging requirements. Electric vehicles, charging infrastructure, photovoltaic inverters, energy storage systems, industrial power supplies, server power systems, and fast charging consumer electronics are raising requirements for heat dissipation, electrical conductivity, solder layer uniformity, and long term reliability. As a result, soft solder die attach remains an important process for power discrete devices and selected power module packages. Compared with epoxy die attach, soft solder bonding provides better thermal and electrical performance; compared with advanced bonding technologies such as silver sintering and copper sintering, it still offers advantages in cost, throughput, process maturity, and supply chain readiness for established power packages. Fully automatic systems with high speed leadframe handling, 12 inch wafer compatibility, low oxygen atmosphere control, stable solder feeding, inline vision inspection, and data traceability are becoming key purchasing priorities for OSATs and power device manufacturers.

The main market constraints come from narrower process windows, long customer qualification cycles, and substitution pressure from advanced packaging technologies. Soft solder die attach requires strict control over solder spreading, void rate, oxidation, die shift, bond line thickness, interface reliability, and thermal cycling life. Equipment suppliers therefore need capabilities in mechanical precision, thermal process control, low oxygen management, motion control, and process database optimization. Automotive grade power device qualification cycles are relatively long, and equipment procurement can also be affected by semiconductor capital expenditure cycles, OSAT expansion schedules, and downstream inventory fluctuations. Over the medium to long term, silver sintering, copper sintering, and advanced power module packaging will capture part of the demand in high heat flux applications. However, in mass produced mature packages such as TO, DPAK, PDFN, power MOSFET, IGBT, diode, and rectifier bridge packages, Soft Solder Die Attach Systems will retain a solid demand base, with future growth mainly driven by Asian assembly capacity upgrades, China's equipment localization, SiC device production ramp up, and automation upgrades in automotive grade power device packaging.

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

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

Highlights and key features of the study

Global Soft Solder Die Attach System total production and demand, 2021-2032, (Units)
Global Soft Solder Die Attach System total production value, 2021-2032, (USD Million)
Global Soft Solder Die Attach System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Soft Solder Die Attach System consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Soft Solder Die Attach System domestic production, consumption, key domestic manufacturers and share
Global Soft Solder Die Attach System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Soft Solder Die Attach System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Soft Solder Die Attach System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Soft Solder Die Attach System 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 System 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 System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

Fully Automatic Inline Systems

Semi Automatic Production Systems

Others

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

Automotive and E Mobility

Industrial and Energy

Consumer Power Electronics

Communications and Computing

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

Standard Nitrogen Atmosphere Systems

Enhanced Low Oxygen Control Systems

Vacuum Assisted Soldering Systems

Others

Global Soft Solder Die Attach System 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 System market?

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

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