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Chip Mounter Market Report by Technology (Hole Technology, Surface Mount Technology, Fine Pitch Technology), Application (Consumer Electronics, Medical, Automotive, Telecommunication, and Others), and Region 2024-2032

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Abstracts

The global chip mounter market size reached US$ 6.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 9.8 Billion by 2032, exhibiting a growth rate (CAGR) of 4.8% during 2024-2032. The increasing demand for laptops and smartphones, the rising internet penetration, and the expansion of the consumer electronics industry represent some of the key factors driving the market.

The Increasing Demand for Laptops and Smartphones Augmenting the Market Growth

The increasing demand for laptops and smartphones is a significant driver behind the growth of the chip mounter market. Laptops and smartphones are integral parts of modern life, and their popularity continues to soar as technology advances and connectivity becomes more essential. Chip mounter, a pick-and-place machine, is assembled to accurately place electronic components, such as integrated circuits (ICs), resistors, capacitors, and other chips, onto printed circuit boards (PCBs). These machines play a critical role in manufacturing by ensuring precise and efficient placement of components, enabling the production of high-quality electronic devices. As people increasingly depend on these devices for communication, productivity, entertainment, and access to information, the need for more advanced and capable devices continues to grow. The expansion of e-commerce and the rise of digital platforms have also contributed to the increased demand for laptops and smartphones. To meet the growing demand, manufacturers of laptops and smartphones are continually scaling up their production capacities. This, in turn, drives the demand for

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chip mounters as essential equipment for assembling electronic components onto PCBs. Chip mounters enable high-speed, automated, and precise component placement, ensuring efficient production and meeting the demand for electronic devices.

Competitive analysis such as market structure, market share by key players, player positioning, top winning strategies, competitive dashboard, and company evaluation quadrant has been covered in the report. Also, detailed profiles of all major companies have been provided. The market structure is fragmented with a few number of small and large players operating in the industry due to moderate market growth and high exit barriers. The volume of new entrants is moderate in the chip mounter industry due to the moderate market growth, low product differentiation and switching costs, concentrated market, and high capital investment.

What is Chip Mounter?

The chip mounting technology is a practical solution for achieving higher packaging densities in various industries. Initially introduced as the conventional Through Hole Technology (THT), chip mounting has evolved into Surface Mount Technology (SMT) and, subsequently, Fine Pitch Technology (FPT). Today, manufacturers across multiple sectors, including automotive, telecommunications, medical, and electronics, rely on a combination of SMT and THT for mounting chips onto substrates. The advent of Surface Mount Technology (SMT) revolutionized the chip mounting process by allowing for smaller component sizes and increased automation. SMT involves mounting components directly onto the surface of a PCB, eliminating the need for drilled holes. This technique enables higher packaging densities and improved electrical performance. With SMT, manufacturers can achieve greater miniaturization and optimize space utilization within electronic devices. Fine Pitch Technology (FPT) represents a further advancement in chip mounting. It refers to the ability to mount components with extremely small pitch sizes, allowing for tighter spacing between them. FPT is crucial in producing high-density electronic devices, where minimizing the distance between components is essential for achieving enhanced performance and functionality.

Significant Growth in the Wearable Technology Augmenting the Market Growth

The growth in wearable technology is a significant driver behind the expansion of the chip mounter market. Wearable devices, such as smartwatches, fitness trackers, augmented reality (AR) glasses, and smart clothing, have gained immense popularity in recent years. These devices offer various functionalities, from health monitoring and

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fitness tracking to communication and entertainment. The increasing demand for wearable technology is fueling the need for advanced chip mounting capabilities. Wearable devices are typically compact and require miniaturized components, including integrated circuits, sensors, and other electronic components. Chip mounters are crucial in assembling these small and intricate components onto the wearable device's PCBs, ensuring precise placement and reliable performance. Miniaturization is a vital aspect of wearable technology, as these devices need to be lightweight, unobtrusive, and comfortable to wear. Chip mounters enable manufacturers to achieve the desired level of miniaturization by accurately placing tiny components onto compact PCBs. This capability is essential for meeting the design requirements of wearable devices and providing users with a seamless and comfortable experience. The growing functionalities of wearable devices also contribute to the demand for chip mounters.

Wearables are becoming increasingly sophisticated, incorporating advanced features such as biometric sensors, wireless connectivity, GPS tracking, and energy-efficient processors. These complex functionalities require integrating multiple electronic components, which chip mounters can efficiently handle. Furthermore, the expansion of the Internet of Things (IoT) ecosystem is closely linked to the growth of wearable technology. Wearable devices often serve as data collection points or interface devices within IoT networks. They gather and transmit data to other connected devices or cloud platforms. Chip mounters enable the production of reliable and efficient wearable devices that can seamlessly integrate into IoT networks, contributing to the overall growth of the IoT market. The healthcare sector is one industry that benefits significantly from wearable technology, with applications including remote patient monitoring, fitness and wellness tracking, and medication adherence. The demand for wearable health monitoring devices, in particular, has surged in recent years. Chip mounters play a vital role in assembling the intricate components required for accurate health monitoring, enabling the production of reliable and high-performance wearable healthcare devices.

Chip Mounter Market Trends:

The consumer electronics industry has witnessed significant growth in recent years, driven by several factors, such as the increasing demand for laptops and smartphones, the proliferation of internet connectivity, and the automation of household electronic goods. Chip mounters, utilized in assembling semiconductor components onto printed circuit boards (PCBs) in consumer electronics, are experiencing a considerable increase in overall demand. The rising popularity of laptops and smartphones is a primary driver behind the increased demand for chip mounters. These devices have become essential tools for communication, productivity, and entertainment, driving

consumers to upgrade to the latest models. As a result, manufacturers of consumer electronics require efficient and precise chip mounters to assemble the intricate circuitry and components that power these devices. Additionally, the widespread utilization of the Internet of Things (IoT) and smart home technology has increased the demand for chip mounters. Furthermore, the need for compact and efficient chipsets and PCBs rises as household electronic goods become automated and interconnected. Chip mounters enable the production of smaller, more sophisticated electronic devices, ensuring seamless automation and connectivity. The miniaturization trend in the consumer electronics industry is another factor driving the demand for chip mounters. As consumers demand smaller and more portable devices, manufacturers are compelled to reduce the size of integrated circuits while maintaining high performance. Chip mounters facilitate the assembly of these compact electronic components onto PCBs, enabling the production of sleek and powerful gadgets and wearables. Hardware developers are investing in developing new techniques and technologies to keep up with the growing demand for advanced consumer electronics. These innovations aim to manage more circuitry and components within similar cost parameters. Chip mounters play a crucial role in this process by efficiently and accurately assembling complex electronic components onto PCBs.

Key Market Segmentation:
IMARC Group provides an analysis of the key trends in each sub-segment of the global chip mounter market report, along with forecasts at the global and regional level from 2024-2032. Our report has categorized the market based on technology and application.

Technology Insights:

Hole Technology
Surface Mount Technology
Fine Pitch Technology

The report has provided a detailed breakup and analysis of the chip mounter market based on the technology. This includes hole technology, surface mount technology, and fine pitch technology. According to the report, surface mount technology represented the largest segment due to the increasing trend in the miniaturization of electronics and rising demand for wearable devices. On the other hand, the growing focus on IoT (Internet of Things) in smart home applications has further augmented the demand for IC chips, thereby stimulating the adoption of the technology.

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Application Insights:

Consumer Electronics
Medical
Automotive
Telecommunication
Others

A detailed breakup and analysis of the chip mounter market based on the application have also been provided in the report. This includes consumer electronics, medical, automotive, telecommunication, and others. According to the report, telecommunication accounted for the largest market share. High investments in technologies, such as wireless communication and satellite, are fueling the demand for chips in the telecommunication market. High-power RF devices are being used in infrastructure applications, such as cellphone base stations. On the other hand, the increase in the demand for phones and the high replacement cost of smartphones has further escalated the telecommunication market where improved power management and signal conversion requisition have raised the demand for chip mounters.

Regional Insights:

Asia Pacific
Europe
North America
Middle East and Africa
Latin America

The report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, Europe, North America, the Middle East and Africa, and Latin America. According to the report, Asia Pacific was the largest market for chip mounter. The high manufacturing competence of China has made the region the world's biggest buyer and importer of chips. The governments of various countries are also supporting the industry with the development of several start-up companies. Besides this, the centralization of the production of electronic systems in China has also boosted the market in this region. The flourishing industrial market due to the ongoing push for safer and smarter cities in the Asia-Pacific region has induced the demand for semiconductors, especially in security, automation, solid-state lighting, and transportation segment, thereby accelerating the growth of the chip mounter market.

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Competitive Landscape:
The report has also provided a comprehensive analysis of the competitive landscape in the global chip mounter market. Some of the companies covered in the report include:

Hitachi
Samsung
Panasonic
Juki
ASM Pacific Technology
Canon
Essemtec
Ohashi Engineering
Nordson
Sony
Sun Electronic Industries Corporation
TOA

Please note that this only represents a partial list of companies and the complete list has been provided in the report.

Key Questions Answered in This Report

1. What was the size of the global chip mounter market in 2023?
2. What is the expected growth rate of the global chip mounter market during 2024-2032?
3. What are the key factors driving the global chip mounter market?
4. What has been the impact of COVID-19 on the global chip mounter market?
5. What is the breakup of the global chip mounter market based on the technology?
6. What is the breakup of the global chip mounter market based on the application?
7. What are the key regions in the global chip mounter market?
8. Who are the key players/companies in the global chip mounter market?

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