

Global Fan Out Panel Level Packaging Equipment Market Growth 2026-2032

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Abstracts

The global Fan Out Panel Level Packaging Equipment market size is predicted to grow from US\$ 313 million in 2025 to US\$ 664 million in 2032; it is expected to grow at a CAGR of 11.4% from 2026 to 2032.

Fan Out Panel Level Packaging Equipment refers to advanced semiconductor packaging systems that enable fan-out redistribution layer (RDL) formation and heterogeneous integration using large panel substrates instead of wafers. The equipment integrates die placement, reconstitution, RDL patterning, electroplating, molding, curing, and inspection into a multi-process advanced packaging system. It is mainly used for AI chips, HPC processors, mobile application processors, RF devices, automotive electronics, and advanced heterogeneous integration applications. Main product forms include panel-level fan-out packaging systems, wafer-to-panel reconstitution systems, RDL lithography systems, high-precision die bonding systems, molding and curing systems, and integrated panel packaging production lines. This category excludes wafer-level fan-out equipment not adapted to panel formats, standalone flip-chip bonding machines, front-end semiconductor lithography equipment, and outsourced packaging services. The industrial chain of Fan Out Panel Level Packaging Equipment includes upstream suppliers of lithography systems, laser systems, die bonders, molding materials, photoresists, dielectric materials, electroplating chemicals, substrate panels, vacuum systems, motion control systems, robotics, inspection systems, and semiconductor-grade materials. Midstream manufacturers integrate die placement, reconstitution, RDL formation, electroplating, molding, curing, debonding, and inspection into complete fan-out panel level packaging equipment systems. Downstream applications include OSAT companies, advanced packaging foundries, AI chip packaging providers, mobile semiconductor packaging, automotive semiconductor packaging, HPC chip packaging, and RF module

manufacturers. Supporting services include process development, equipment calibration, yield optimization, installation, maintenance, spare parts supply, operator training, and lifecycle technical support. In 2025, global Fan Out Panel Level Packaging Equipment production reached approximately 13 units, with an average global market price of around US\$24,000,000 per unit. The gross profit margin of major companies in the industry is between 30%–50%. In 2025, the global production capacity of fan out panel level packaging equipment was approximately 19 units.

The Fan Out Panel Level Packaging Equipment market is in an early-stage commercialization phase, driven by advanced semiconductor packaging demand for AI chips, HPC processors, mobile processors, RF devices, and automotive electronics. As traditional semiconductor scaling slows, advanced packaging technologies such as fan-out redistribution and heterogeneous integration have become critical for improving performance, power efficiency, and system integration density. Panel-level fan-out technology enables larger substrate formats compared to wafer-level packaging, improving potential throughput and cost efficiency while supporting high-density redistribution layer (RDL) formation. However, the technology remains technically challenging due to panel warpage control, yield stability, and precision alignment requirements. Equipment manufacturers are focusing on improving die placement accuracy, RDL patterning resolution, process uniformity, material compatibility, and multi-process integration. Overall, the market remains small but is expected to grow steadily as advanced packaging shifts toward panel-level architectures and AI-driven semiconductor demand increases.

LP Information, Inc. (LPI) ' newest research report, the “Fan Out Panel Level Packaging Equipment Industry Forecast” looks at past sales and reviews total world Fan Out Panel Level Packaging Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Fan Out Panel Level Packaging Equipment sales for 2026 through 2032. With Fan Out Panel Level Packaging Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Fan Out Panel Level Packaging Equipment industry.

This Insight Report provides a comprehensive analysis of the global Fan Out Panel Level Packaging Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Fan Out Panel Level Packaging Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fan Out Panel Level

Packaging Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fan Out Panel Level Packaging Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fan Out Panel Level Packaging Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Fan Out Panel Level Packaging Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Panel Lithography and Direct-Imaging Equipment

Panel Coating, Developing and Wet-Process Equipment

Panel Molding and Encapsulation Equipment

Panel Inspection, Metrology and Singulation Equipment

Panel Thin-Film Deposition Equipment

Segmentation by Carrier Type:

Glass Carrier Fan Out Panel Level Packaging Equipment

Organic Carrier Fan Out Panel Level Packaging Equipment

Metal Carrier Fan Out Panel Level Packaging Equipment

Segmentation by Panel Size:

Up to 300 mm by 300 mm Panel Size

Above 300 mm by 300 mm to 515 mm by 510 mm Panel Size

Above 515 mm by 510 mm Panel Size

Segmentation by Application:

High-Performance Computing and AI Chip Packaging

Mobile Processor and RF Device Packaging

Automotive and Power Device Packaging

MEMS, Sensor and Optoelectronic Device Packaging

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Lam Research Corporation

Applied Materials, Inc.

Onto Innovation Inc.

ACM Research (Shanghai), Inc.

EV Group

ERS electronic GmbH

Evatec AG

TOWA Corporation

Shibaura Mechatronics Corporation

SCREEN Finetech Solutions Co., Ltd.

Tokyo Electron Limited

DISCO Corporation

ULVAC, Inc.

Toray Engineering Co., Ltd.

Shin-Etsu Engineering Co., Ltd.

Hirata Corporation

Chugai Ro Co., Ltd.

ASMPT Ltd.

Manz Asia Ltd.

MACTECH CORPORATION

Utechzone Co., Ltd.

FAVITE INC.

Camtek Ltd.

Circuit Fabology Microelectronics Equipment Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fan Out Panel Level Packaging Equipment market?

What factors are driving Fan Out Panel Level Packaging Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Fan Out Panel Level Packaging Equipment market opportunities vary by end market size?

How does Fan Out Panel Level Packaging Equipment break out by Type, by Application?

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