

Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging Market Growth 2026-2032

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Abstracts

The global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market size is predicted to grow from US\$ 1643 million in 2025 to US\$ 3516 million in 2032; it is expected to grow at a CAGR of 11.3% from 2026 to 2032.

Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging refers to specialized laser-based manufacturing tools used in back-end semiconductor assembly, wafer-level packaging, advanced packaging, power device packaging, and package substrate processing. These systems apply UV, IR, green, picosecond, femtosecond, or other laser beams, together with beam delivery optics, precision motion platforms, machine vision alignment, automated handling, process control software, and clean processing modules, to perform non-contact and high-precision operations on silicon, SiC, GaN, GaAs, glass, molding compounds, low-k dielectric layers, metal wiring layers, package substrates, and packaged semiconductor devices. Typical equipment includes wafer laser dicing systems, laser grooving tools, stealth or modified laser dicing systems, wafer and package laser marking systems, strip/tray/wafer-level marking handlers, laser debonding tools, laser lift-off systems, TGV/TMV laser drilling tools, and laser-assisted bonding or soldering systems for advanced packaging. The core value of this equipment category lies in enabling low-stress singulation, narrow kerf width, high-throughput traceability, clean debonding, fine via formation, and scalable processing for thin wafers, heterogeneous integration, high-density interconnects, HBM, fan-out, and compound semiconductor packaging.

Based on our research, Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging should be understood as a specialized group of back-end process tools rather than a simple extension of general-purpose industrial laser systems. The

market is driven by process requirements that are specific to semiconductor packaging, including thin-wafer handling, low-stress singulation, narrow kerf width, low particle contamination, permanent traceability, clean carrier separation, and high-density interconnect formation. Laser dicing, laser grooving, wafer and package laser marking, laser debonding, laser lift-off, and TGV/TMV laser drilling have become increasingly relevant as advanced packaging structures move toward thinner wafers, more complex material stacks, higher interconnect density, and stricter yield requirements. In this study, we adopt a narrow equipment revenue scope and include only complete equipment systems used in semiconductor assembly, wafer-level packaging, advanced packaging, and related package substrate processing. Front-end laser annealing, general PCB laser drilling, display and photovoltaic laser tools, laser sources, optics, and temporary bonding materials are excluded from the revenue model.

From a demand perspective, the growth logic is increasingly tied to AI infrastructure, high-performance computing, HBM, 2.5D/3D integration, fan-out packaging, compound semiconductors, and regional packaging capacity expansion. Advanced packaging increases the need for temporary bonding and debonding, fine laser grooving, carrier separation, and traceability at wafer, strip, tray, and package levels. SiC, GaN, GaAs, and other hard or brittle materials create additional process demand for non-contact, low-chipping laser singulation. At the same time, packaging capacity expansion in China, Taiwan, South Korea, Malaysia, Singapore, and other Asian regions is creating more room for local and regional equipment suppliers. This does not mean that laser tools will replace all mechanical or plasma-based processes, but it does indicate that laser processing will become a more important enabling layer for advanced and high-yield packaging flows.

From a technology roadmap perspective, the market is shifting from standalone laser tools toward integrated process platforms. Laser grooving and dicing systems are increasingly combined with coating, cleaning, automated wafer handling, vision alignment, and data communication modules. Laser marking systems are evolving toward higher-throughput strip, tray, and wafer-level traceability. Laser debonding and laser lift-off tools are moving toward larger substrates, better beam uniformity, lower thermal impact, and lower residue. The next phase of competition will be less about demonstrating laser-material interaction and more about delivering stable process windows, consumable-light operation, cleanroom-compatible automation, installed-base support, and qualification with leading OSATs, IDMs, foundries, and package substrate makers.

LP Information, Inc. (LPI) ' newest research report, the ?Laser Processing Equipment

for Semiconductor Assembly and Advanced Packaging Industry Forecast? looks at past sales and reviews total world Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging sales in 2025, providing a comprehensive analysis by region and market sector of projected Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging sales for 2026 through 2032. With Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging industry.

This Insight Report provides a comprehensive analysis of the global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging 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 Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging 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 Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Laser Dicing Equipment

Laser Grooving Equipment

Laser Marking Equipment

Laser Bonding / Soldering Equipment

Other

Segmentation by Laser Technology:

UV Laser Processing

IR Laser Processing

Green Laser Processing

Other Laser Technologies

Segmentation by Equipment Automation Level:

Manual Equipment

Semi-automatic Equipment

Fully Automatic Standalone Equipment

Segmentation by Wafer / Substrate Size:

4-inch and Below

6-inch

8-inch

12-inch

Customized Format

Segmentation by Application:

Wafer Singulation

Traceability Marking

Laser-assisted Joining

Other

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.

Tokyo Electron Limited

Coherent Corp.

Keyence Corporation

MKS Instruments, Inc.

DISCO Corporation

Han's Laser Technology Industry Group Co., Ltd.

ASMPT Limited

HGTECH Co., Ltd.

Maxwell Technologies Co., Ltd.

ACCRETECH

EV Group

SUSS MicroTec SE

LPKF Laser & Electronics SE

EO Technics Co., Ltd.

Shin-Etsu Engineering Co., Ltd.

Suzhou Delphi Laser Co., Ltd.

DR Laser

3D-Micromac AG

Synova S.A.

InnoLas Semiconductor GmbH

Pentamaster Corporation Berhad

Genesem Inc.

PacTech ? Packaging Technologies GmbH

PowerTECH Co., Ltd.

Wisee Tec Co., Ltd.

FOBA Laser Marking + Engraving

OpTek Systems

Key Questions Addressed in this Report

What is the 10-year outlook for the global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market?

What factors are driving Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market growth, globally and by region?

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

How do Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging market opportunities vary by end market size?

How does Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging break out by Type, by Application?

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Figure 32. Product Picture of 12-inch

Figure 33. Product Picture of Customized Format

Figure 34. Global Laser Processing Equipment for Semiconductor Assembly and Advanced Packaging Sales Market Shar

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