

Global Soft Solder Die Attach Equipment Market Growth 2026-2032

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Abstracts

The global Soft Solder Die Attach Equipment market size is predicted to grow from US\$ 303 million in 2025 to US\$ 464 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global Soft Solder Die Attach 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 Soft Solder Die Attach Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Soft Solder Die Attach Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Soft Solder Die Attach 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 Soft Solder Die Attach Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Soft Solder Die Attach Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fully Automatic Inline Systems

Semi Automatic Production Systems

Others

Segmentation by End Use Industry:

Automotive and E Mobility

Industrial and Energy

Consumer Power Electronics

Communications and Computing

Segmentation by Solder Feeding Method:

Solder Wire Feeding Systems

Solder Preform Placement Systems

Solder Ribbon Feeding Systems

Solder Paste Dispensing Systems

Segmentation by Process Atmosphere:

Standard Nitrogen Atmosphere Systems

Enhanced Low Oxygen Control Systems

Vacuum Assisted Soldering Systems

Others

Segmentation by Application:

Leadframe Power Discrete Packages

Power Module Packages

Others

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.

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 Addressed in this Report

What is the 10-year outlook for the global Soft Solder Die Attach Equipment market?

What factors are driving Soft Solder Die Attach Equipment market growth, globally and by region?

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

How do Soft Solder Die Attach Equipment market opportunities vary by end market size?

How does Soft Solder Die Attach Equipment break out by Type, by Application?

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