

SMT Equipment Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/S3E85DE0206BEN.html>

Date: July 2025

Pages: 110

Price: US\$ 3,200.00 (Single User License)

ID: S3E85DE0206BEN

Abstracts

SMT Equipment Market Summary

Introduction

Surface-mount technology (SMT) equipment is used in electronics manufacturing to place and solder components onto printed circuit boards (PCBs), enabling high-speed, automated production. The industry is characterized by its role in producing compact, high-performance electronics for automotive, consumer, and communication sectors. Key trends include advancements in high-precision pick-and-place systems, AI-driven inspection equipment, and energy-efficient designs. The market is driven by demand for consumer electronics, automotive electronics, and 5G infrastructure, with challenges including high equipment costs and the need for continuous technological upgrades. The global SMT equipment market was valued at USD 4.2–7.8 billion in 2024, with an estimated CAGR of 5.5%–7.5% from 2025 to 2030, propelled by automotive and consumer electronics applications.

Market Size and Growth Forecast

The global SMT Equipment market was valued at USD 4.2–7.8 billion in 2024, with an estimated CAGR of 5.5%–7.5% from 2025 to 2030, driven by automotive and consumer electronics.

Regional Analysis

Asia Pacific is projected to grow at a CAGR of 6.0%–8.0%, led by China, Japan, and

South Korea, where electronics manufacturing and 5G deployment drive demand, emphasizing high-speed, automated equipment.

North America anticipates a CAGR of 5.0%–7.0%, with the U.S. leading due to automotive electronics and IoT applications, focusing on precision systems.

Europe expects a CAGR of 4.8%–6.8%, with Germany driving growth through automotive and industrial electronics, prioritizing energy-efficient designs.

Rest of the World is projected to grow at a CAGR of 4.5%–6.5%, supported by emerging electronics markets in Latin America and the Middle East.

Application Analysis

Automotive electronics applications are estimated to grow at a CAGR of 5.8%–7.8%, driven by EV and ADAS production, with trends toward high-precision equipment.

Consumer Electronics applications are projected to expand at a CAGR of 5.5%–7.5%, fueled by smartphones and wearables, emphasizing compact, high-speed systems.

Network Communications applications anticipate a CAGR of 6.0%–8.0%, driven by 5G infrastructure, with innovations in automated inspection equipment.

Other applications, like medical electronics, are expected to grow at a CAGR of 4.8%–6.8%, focusing on reliable, high-quality systems.

Type Analysis

Pick & Place Equipment is estimated to grow at a CAGR of 5.8%–7.8%, valued for high-speed component placement, with trends toward AI-driven precision.

Inspection Equipment is projected to grow at a CAGR of 5.5%–7.5%, driven by quality control needs, with innovations in automated optical inspection.

Dispensing Equipment anticipates a CAGR of 5.0%–7.0%, used for adhesive application, with trends toward precision dispensing.

Screen Printer Equipment is expected to grow at a CAGR of 5.2%–7.2%, critical for solder paste application, with advancements in high-accuracy printing.

Other Equipment, like reflow ovens, is projected to grow at a CAGR of 4.8%–6.8%, focusing on energy efficiency.

Key Market Players

ASM Pacific Technology, headquartered in Singapore, develops SMT equipment for electronics, focusing on high-speed pick-and-place systems.

JUKI, based in Tokyo, Japan, produces automated SMT equipment for consumer electronics, emphasizing precision and scalability.

Fuji Machine, located in Aichi, Japan, supplies high-performance SMT systems for automotive applications, focusing on automation.

Panasonic, headquartered in Osaka, Japan, develops SMT equipment for network communications, emphasizing energy-efficient designs.

Yamaha Motor, based in Iwata, Japan, produces SMT systems for high-volume production, focusing on versatility.

Hanwha, located in Seoul, South Korea, supplies SMT equipment for electronics, emphasizing cost-effectiveness.

Mycronic, headquartered in Täby, Sweden, develops inspection and dispensing equipment, focusing on precision.

Kulicke & Soffa, based in Singapore, produces SMT systems for semiconductor applications, emphasizing advanced technology.

Porter's Five Forces Analysis

Threat of New Entrants: Low; high capital and technological barriers limit entry.

Bargaining Power of Suppliers: Moderate; specialized components increase supplier influence.

Bargaining Power of Buyers: Moderate; large electronics manufacturers negotiate, but advanced equipment limits leverage.

Threat of Substitutes: Low; alternative assembly methods are less efficient for high-volume production.

Competitive Rivalry: High; players compete through innovation, automation, and global supply chains.

Market Opportunities and Challenges

Opportunities

Growth in 5G infrastructure drives demand for high-speed SMT equipment.

Expansion of EV and ADAS production creates opportunities for precision systems.

Emerging electronics markets in Asia Pacific offer growth potential.

Challenges

High equipment costs limit adoption in smaller markets.

Rapid technological changes require continuous upgrades.

Supply chain disruptions impact component availability.

Growth Trend Analysis

The SMT Equipment market is growing steadily. In October 2024, Scanfil acquired SRXGlobal, adding eight SMT lines in Australia and Malaysia. On April 9, 2025, Incap Electronics US invested USD 2 million in advanced SMT equipment, boosting capacity by 110%. On April 23, 2025, StenTech combined with BlueRing Stencils, enhancing SMT stencil capabilities. On May 23, 2025, Lumel S.A. launched its fourth SMT line, supported by EU funds, increasing production capacity. These align with a projected CAGR of 5.5%–7.5% through 2030.

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