

# **Surface Mount Technology Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Passive Components, Active Components), By End-User Industry (Consumer Electronics, Automotive, Industrial Electronics, Aerospace & Defense, Healthcare, Other), By Region & Competition, 2019-2029F**

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## **Abstracts**

Global Surface Mount Technology Market was valued at USD 6.5 Billion in 2023 and is expected to reach at USD 9.95 Billion in 2029 with a CAGR of 7.2% through 2029. The global surface mount technology (SMT) market is experiencing significant growth driven by the expanding demand for miniaturized and high-performance electronic devices. As industries such as consumer electronics, automotive, telecommunications, and healthcare increasingly require compact, efficient, and reliable components, SMT has become the preferred choice due to its advantages over traditional through-hole mounting techniques. The rise of Internet of Things (IoT) devices, wearable technology, and advanced automotive systems is fueling this growth, as SMT enables higher component density and better performance in smaller form factors. Additionally, advancements in SMT equipment and materials are enhancing manufacturing efficiency and product quality, further boosting market expansion. The integration of artificial intelligence (AI) and automation in SMT processes is also contributing to the market's upward trajectory by optimizing production and reducing costs. Geographically, regions such as Asia-Pacific, North America, and Europe are at the forefront of this growth, driven by robust industrial infrastructure and innovation hubs. As technology continues to evolve and consumer demands shift towards more sophisticated electronics, the SMT market is poised for sustained expansion, offering significant opportunities for stakeholders across the value chain.

## Key Market Drivers

### Increasing Demand for Consumer Electronics

The surge in demand for consumer electronics is a primary driver of the global surface mount technology (SMT) market. The proliferation of smartphones, tablets, laptops, and smart home devices has significantly boosted the need for compact and efficient electronic components. SMT's ability to support high-density mounting and miniaturization of components makes it ideal for these devices, which are characterized by their small form factors and high performance. As consumer electronics continue to evolve with advanced features and more integrated functionalities, manufacturers are increasingly adopting SMT to meet these demands. The continuous innovation in consumer electronics, including the rise of wearable technology and smart gadgets, further fuels the demand for SMT solutions. This trend is expected to persist as consumer preferences shift towards more sophisticated and compact devices, driving further growth in the SMT market.

### Expansion of Automotive Electronics

The automotive industry's rapid evolution towards more sophisticated electronics is a significant driver of the SMT market. Modern vehicles are equipped with a myriad of electronic systems, including advanced driver assistance systems (ADAS), infotainment systems, and electric powertrains. These systems require high-density, reliable, and miniaturized electronic components that SMT can efficiently provide. As automotive technology progresses, including the shift towards electric and autonomous vehicles, the demand for advanced SMT solutions is growing. SMT's capability to support complex circuitry and high-performance components is crucial for meeting the stringent requirements of automotive applications. Additionally, the increasing focus on vehicle safety, connectivity, and enhanced user experience further accelerates the adoption of SMT in the automotive sector.

### Growth in the Internet of Things (IoT)

The expansion of the Internet of Things (IoT) is a significant driver of the global SMT market. IoT devices, which range from smart home appliances to industrial sensors, require compact, reliable, and efficient electronic components to function effectively. SMT is well-suited to meet these needs due to its ability to support high-density mounting and miniaturization. As IoT applications become more prevalent across

various sectors, including smart cities, healthcare, and industrial automation, the demand for SMT components is increasing. The growth of IoT is also driving innovation in SMT technology, with advancements aimed at improving performance, reducing costs, and enhancing integration capabilities. This continuous evolution and expansion of IoT applications are expected to sustain strong demand for SMT solutions in the foreseeable future.

### Rising Focus on Automation and Industry 4.0

The rising focus on automation and Industry 4.0 is a key driver of the SMT market. Industry 4.0 represents the integration of digital technologies, such as artificial intelligence, machine learning, and the Internet of Things, into manufacturing processes. In the context of SMT, automation technologies are streamlining production lines, enhancing precision, and reducing manual intervention. Automated SMT equipment, including pick-and-place machines and soldering systems, improves production efficiency and consistency. Furthermore, the adoption of smart manufacturing practices, such as real-time monitoring and predictive maintenance, is optimizing SMT processes and driving down costs. The shift towards Industry 4.0 is also fostering innovation in SMT technology, enabling manufacturers to meet the evolving demands of a digitalized and highly automated production environment. This trend is expected to continue driving growth in the SMT market as industries embrace advanced manufacturing technologies and processes.

### Key Market Challenges

#### High Cost of Advanced SMT Equipment

One of the primary challenges facing the global surface mount technology (SMT) market is the high cost associated with advanced SMT equipment. The latest SMT machines, including high-precision pick-and-place systems, advanced soldering stations, and sophisticated inspection tools, require significant capital investment. This high upfront cost can be a barrier for small and medium-sized enterprises (SMEs) and emerging manufacturers, limiting their ability to compete effectively in the market. Moreover, maintaining and upgrading these systems involves additional expenses, including training for operators and regular maintenance to ensure optimal performance. The financial burden associated with acquiring and operating state-of-the-art SMT equipment may also lead to longer ROI periods, which can be a deterrent for companies considering investment in advanced SMT technologies. This challenge can impact the overall growth of the SMT market by hindering the adoption of new technologies and

limiting the market's ability to address increasing demands for high-performance and miniaturized electronic components.

### Supply Chain Disruptions

Supply chain disruptions represent a significant challenge for the global SMT market. The SMT industry relies on a complex network of suppliers for raw materials, components, and equipment, including semiconductors, soldering materials, and electronic components. Disruptions in this supply chain, caused by factors such as geopolitical tensions, natural disasters, or global pandemics, can lead to delays, increased costs, and shortages of critical materials. Such disruptions can affect production schedules, lead to extended lead times, and ultimately impact the delivery of finished products to customers. Additionally, fluctuations in material prices due to supply chain issues can affect the overall cost structure for manufacturers, potentially leading to increased prices for end-users. Addressing these supply chain challenges requires robust risk management strategies, diversified sourcing, and improved supply chain visibility to minimize the impact of disruptions and ensure continuity in production.

### Technological Obsolescence

Technological obsolescence is a pressing challenge in the SMT market, given the rapid pace of technological advancements in electronics. The continuous evolution of electronic devices and components requires SMT equipment and materials to keep up with the latest innovations. As new technologies emerge, older SMT systems and components can quickly become outdated, leading to reduced efficiency, compatibility issues, and higher maintenance costs. Manufacturers must invest in frequent upgrades and replacements to stay competitive, which can be both costly and resource-intensive. Furthermore, technological obsolescence can impact the integration of new technologies with existing systems, creating compatibility challenges and potentially slowing down the adoption of advanced SMT solutions. Staying abreast of technological trends and investing in the latest SMT innovations is essential for manufacturers to avoid obsolescence and maintain their competitive edge in the market.

### Environmental and Regulatory Compliance

Environmental and regulatory compliance is an increasingly significant challenge for the global SMT market. As environmental regulations become more stringent, manufacturers are required to adhere to stricter standards related to the use of hazardous materials, waste management, and energy consumption. For example, the

transition to lead-free solders and other eco-friendly materials is mandated by regulations such as the Restriction of Hazardous Substances (RoHS) directive. Compliance with these regulations necessitates investment in new materials, processes, and technologies, which can increase production costs. Additionally, manufacturers must implement effective waste management and recycling programs to minimize their environmental impact. Navigating these complex regulatory requirements and ensuring compliance can be challenging, especially for companies operating across multiple regions with varying regulations. Failure to meet environmental and regulatory standards can result in legal penalties, damage to brand reputation, and loss of market access, making compliance a critical consideration for SMT manufacturers.

## Key Market Trends

### Miniaturization and Increased Component Density

The trend towards miniaturization and increased component density is profoundly shaping the global surface mount technology (SMT) market. As electronic devices become smaller and more complex, there is a growing demand for SMT solutions that can accommodate high-density mounting and compact designs. This trend is driven by the proliferation of consumer electronics, such as smartphones, wearables, and compact IoT devices, which require efficient use of space and enhanced performance. SMT is particularly suited to these needs due to its ability to support high-density component placement and miniaturized designs. Manufacturers are increasingly adopting advanced SMT technologies, including smaller package sizes and finer pitch components, to meet the requirements of modern electronic devices. This trend is also influencing the development of new SMT materials and processes, aimed at improving reliability and performance while reducing size. The push towards miniaturization is expected to continue as technological advancements drive demand for increasingly compact and integrated electronic solutions, further fueling growth in the SMT market.

### Automation and Smart Manufacturing

Automation and smart manufacturing are key trends driving the evolution of the SMT market. The integration of automation technologies, including robotics, artificial intelligence (AI), and machine learning, is transforming SMT production processes by enhancing efficiency, precision, and consistency. Automated pick-and-place machines, advanced soldering systems, and real-time inspection technologies are becoming standard in SMT manufacturing, reducing the need for manual intervention and minimizing human error. Additionally, the implementation of Industry 4.0 principles, such

as data analytics and Internet of Things (IoT) connectivity, is enabling manufacturers to optimize production lines, monitor performance in real time, and predict maintenance needs. This shift towards smart manufacturing not only improves operational efficiency but also supports higher-quality output and cost reduction. As manufacturers continue to embrace automation and smart technologies, the SMT market is expected to experience significant growth, driven by the need for more sophisticated and efficient production solutions.

### Growth of Advanced Packaging Technologies

The growth of advanced packaging technologies is a notable trend in the SMT market. As electronic devices become more complex and performance requirements increase, traditional packaging methods are being supplemented by advanced packaging solutions, such as system-in-package (SiP), 3D packaging, and chip-on-board (COB) technologies. These advanced packaging methods offer enhanced functionality, reduced size, and improved performance, making them increasingly popular in high-end electronics applications. SMT plays a critical role in these advanced packaging technologies by providing the necessary precision and density for effective component placement and interconnection. The adoption of advanced packaging solutions is driven by the need for higher integration, improved thermal management, and better electrical performance in electronic devices. This trend is particularly evident in sectors such as consumer electronics, automotive, and telecommunications, where the demand for advanced packaging is growing rapidly. As technology continues to evolve, the SMT market is expected to expand in tandem with the advancement of packaging technologies, supporting the development of next-generation electronic devices.

### Demand for Lead-Free and Environmentally Friendly Materials

The increasing demand for lead-free and environmentally friendly materials is a significant trend in the global SMT market. Driven by stringent environmental regulations and growing consumer awareness of sustainability, manufacturers are shifting towards the use of lead-free solders and eco-friendly materials in SMT processes. Regulations such as the European Union's Restriction of Hazardous Substances (RoHS) directive mandate the reduction or elimination of hazardous substances, including lead, in electronic components. As a result, there is a rising emphasis on developing and adopting alternative materials that meet these regulatory requirements while maintaining high performance and reliability. This trend is leading to innovations in soldering materials, such as lead-free alloys, and the development of new SMT processes that support environmental sustainability. The shift towards green



manufacturing practices is not only driven by regulatory compliance but also by the desire to enhance brand reputation and meet consumer expectations for environmentally responsible products. As the focus on sustainability intensifies, the SMT market will continue to evolve, embracing eco-friendly materials and practices to align with global environmental goals.

### Increasing Adoption of Flexible and Printed Electronics

The adoption of flexible and printed electronics is a burgeoning trend within the SMT market, reflecting the industry's shift towards innovative and versatile electronic solutions. Flexible electronics, which include printed circuits and organic light-emitting diodes (OLEDs), offer significant advantages in terms of form factor, durability, and weight, enabling the creation of new types of electronic devices that can be bent, stretched, or conformed to various shapes. This trend is driven by advancements in materials science and printing technologies, which facilitate the production of flexible and printed electronic components using low-cost, high-volume processes. Applications of flexible and printed electronics span across consumer electronics, wearable technology, medical devices, and automotive systems, where flexibility and adaptability are crucial. The integration of SMT with flexible and printed electronics is essential for achieving high performance and reliability in these innovative applications. As the demand for flexible and adaptable electronic solutions grows, the SMT market is expected to expand, driven by the need for technologies that support the development of next-generation electronic devices and systems.

### Segmental Insights

#### Component Insights

The global surface mount technology (SMT) market was predominantly dominated by passive components, a trend that is anticipated to persist throughout the forecast period. Passive components, including resistors, capacitors, and inductors, play a crucial role in electronic assemblies due to their essential functions in filtering, stabilizing, and storing energy within circuits. Their widespread use across various applications, from consumer electronics and telecommunications to automotive and industrial sectors, underscores their significant market presence. The increasing demand for miniaturized and high-performance electronic devices drives the growth of passive components, as these components are integral to enhancing the functionality and reliability of modern electronics. Additionally, advancements in technology and the proliferation of electronic devices that require compact, high-efficiency components

further cement the dominance of passive components in the SMT market. This trend is bolstered by the continued innovation in passive component design and manufacturing, which supports the evolving needs of electronic device manufacturers. As electronics continue to become more integrated and sophisticated, the reliance on passive components for their stability and performance ensures their leading position in the SMT market both in 2023 and in the coming years.

## Regional Insights

The Asia-Pacific region emerged as the dominant force in the global surface mount technology (SMT) market, a position expected to be maintained throughout the forecast period. This dominance is largely attributed to the region's robust electronics manufacturing ecosystem, which includes leading countries like China, Japan, South Korea, and Taiwan. The Asia-Pacific region is home to some of the world's largest and most advanced electronics manufacturing hubs, which drive significant demand for SMT components due to their critical role in producing a wide array of electronic devices, from consumer electronics to industrial machinery. The region benefits from a well-established supply chain, cost advantages, and substantial investments in technology and infrastructure, which further reinforce its leadership in the SMT market. Additionally, the rapid adoption of cutting-edge technologies, such as 5G, IoT, and AI, in Asia-Pacific countries accelerates the need for advanced SMT solutions to support the development of high-performance electronic devices. The strong presence of major electronics manufacturers and the continuous innovation within the region bolster its position as a key market player. As the global electronics industry continues to expand and evolve, the Asia-Pacific region's strategic importance and competitive advantages are expected to sustain its dominant role in the SMT market, driving both growth and technological advancements in the sector well into the future.

## Key Market Players

Samsung Electronics Co., Ltd.

Murata Manufacturing Co., Ltd.

Taiyo Yuden Co., Ltd.

Yageo Corporation

Vishay Intertechnology, Inc.



KYOCERA AVX Components Corporation

TE Connectivity Ltd.

Intel Corporation

Texas Instruments Incorporated

Analog Devices, Inc.

ROHM Co., Ltd

Panasonic Corporation

#### Report Scope:

In this report, the Global Surface Mount Technology Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Surface Mount Technology Market, By Component:

Passive Components

Active Components

#### Surface Mount Technology Market, By End-User Industry:

Consumer Electronics

Automotive

Industrial Electronics

Aerospace & Defense

Healthcare

Other

Surface Mount Technology Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Surface Mount Technology Market.

## Available Customizations:

Global Surface Mount Technology market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

*Surface Mount Technology Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By...*

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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  - 15.6.5. Key Product/Services Offered
- 15.7. TE Connectivity Ltd.
  - 15.7.1. Business Overview
  - 15.7.2. Key Revenue and Financials
  - 15.7.3. Recent Developments
  - 15.7.4. Key Personnel/Key Contact Person
  - 15.7.5. Key Product/Services Offered
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  - 15.8.1. Business Overview
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  - 15.8.4. Key Personnel/Key Contact Person
  - 15.8.5. Key Product/Services Offered
- 15.9. Texas Instruments Incorporated



- 15.9.1. Business Overview
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  - 15.12.3. Recent Developments
  - 15.12.4. Key Personnel/Key Contact Person
  - 15.12.5. Key Product/Services Offered

## **16. STRATEGIC RECOMMENDATIONS**

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