

Global Chip-to-Substrate Bonding Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Chip-to-Substrate Bonding Equipment market size was valued at US\$ 587 million in 2025 and is forecast to a readjusted size of US\$ 1002 million by 2032 with a CAGR of 7.8% during review period.

Chip-to-Substrate Bonding Equipment refers to advanced packaging equipment used to accurately place and bond bare dies, chiplets, optoelectronic chips, MEMS devices, or power semiconductor dies onto package substrates, ceramic substrates, silicon interposers, carriers, or submounts. Its core functions include die picking, flipping, optical alignment, substrate positioning, bonding-force control, thermal, laser, ultrasonic, or thermo-compression process control, flux or solder handling, post-bond inspection, and process traceability. These systems are typically supplied as fully automatic or semi-automatic platforms, with key specifications including placement accuracy, bonding force, thermal uniformity, cycle time, supported die size, substrate size, and compatibility with multi-die processes. Major applications include flip-chip packaging, 2.5D/3D advanced packaging, AI and HPC chips, HBM-related packaging, silicon photonics, optical communication modules, automotive-grade power devices, and high-reliability industrial or defense electronics. Major supply bases are concentrated in Singapore/Hong Kong-linked ecosystems, the Netherlands, Switzerland, the United States, Germany, France, and Japan, while mainland Chinese suppliers are accelerating entry into mid- to high-precision segments under advanced packaging localization demand.

In 2025, global production of Chip-to-Substrate Bonding Equipment reached approximately 280-340 units, with mainstream fully automatic production tools priced at

an average FOB range of USD 1.4-2.6 million per unit. High-precision C2S thermo-compression bonding systems, flip-chip bonders, and large-format multi-die bonding platforms for AI and HPC advanced packaging were priced significantly above conventional epoxy or soft-solder die attach systems, mainly due to higher requirements for placement accuracy, bonding-force control, thermal control, substrate handling, automatic loading, in-line inspection, and process traceability.

As AI accelerators, HPC processors, HBM, chiplets, multi-die modules, and high-bandwidth interconnect packages move into capacity expansion, Chip-to-Substrate Bonding Equipment is evolving from a conventional back-end assembly tool into a critical process platform for advanced packaging. These systems directly affect alignment accuracy, interconnect reliability, thermo-mechanical stability, and yield consistency between bare dies and package substrates, making them especially important for large high-value dies, heterogeneous multi-chip integration, and fine-pitch flip-chip interconnects. Over the next several years, demand will be driven mainly by advanced packaging foundries, leading OSATs, IDMs, memory manufacturers, silicon photonics module makers, and power semiconductor suppliers. Asia will remain the largest demand region, while North America, Europe, and Japan will focus more on high-end process development, automotive electronics, defense and aerospace, silicon photonics, and localized advanced packaging capacity.

The main market challenges include high equipment prices, long customer qualification cycles, deep customization for leading customers, and process complexity caused by different die sizes, substrate materials, warpage behavior, thermal-compression windows, and flux-residue control. For equipment suppliers, competition is shifting from placement speed alone toward integrated capabilities in accuracy, force control, thermal control, cleanliness, in-line inspection, data traceability, and line-level integration. As package interconnects migrate from conventional bumps toward fine-pitch copper pillars, micro-bumps, fluxless thermo-compression, and higher-density interconnect structures, suppliers with proven C2S TCB, multi-die placement, large-substrate handling, and high-yield production experience are expected to gain stronger pricing power, while lower-end general-purpose die attach equipment suppliers will face pressure to move up the technology curve.

This report is a detailed and comprehensive analysis for global Chip-to-Substrate Bonding Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets.

Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Chip-to-Substrate Bonding Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-to-Substrate Bonding Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-to-Substrate Bonding Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Chip-to-Substrate Bonding Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Chip-to-Substrate Bonding Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Chip-to-Substrate Bonding Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASMPT Ltd, BE Semiconductor Industries N.V., Kulicke & Soffa Industries, Inc., Shibaura Mechatronics Corporation, Toray Engineering Co., Ltd., Panasonic Connect Co., Ltd., Yamaha Robotics Co., Ltd., Canon Machinery Inc., Shibuya Corporation, HANMI Semiconductor Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Chip-to-Substrate Bonding Equipment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

- Chip to Organic Package Substrate Bonder

- Chip to Ceramic Substrate Bonder

- Chip to Silicon Interposer Bonder

- Chip to Submount or Carrier Bonder

Market segment by Placement Accuracy

- Ultra High Precision below Two Micrometers

- High Precision from Two to Five Micrometers

- Standard Precision above Five Micrometers

Market segment by Equipment Form

- Fully Automatic Production Bonder

- Semi Automatic Production Bonder

- Laboratory and Process Development Bonder

Market segment by Bonding Technology

Thermo Compression Bonding

Flip Chip Mass Reflow Bonding

Eutectic and Soft Solder Bonding

Epoxy Die Attach Bonding

Market segment by Application

Advanced Logic and Chiplet Packaging

High Bandwidth Memory Related Packaging

Optoelectronic and Silicon Photonics Packaging

Power and Automotive Device Packaging

Major players covered

ASMPT Ltd

BE Semiconductor Industries N.V.

Kulicke & Soffa Industries, Inc.

Shibaura Mechatronics Corporation

Toray Engineering Co., Ltd.

Panasonic Connect Co., Ltd.

Yamaha Robotics Co., Ltd.

Canon Machinery Inc.

Shibuya Corporation

HANMI Semiconductor Co., Ltd.

Hanwha Semitech Co., Ltd.

Mycronic AB

SET Corporation

Finetech GmbH & Co. KG

PacTech - Packaging Technologies GmbH

Dr. Tresky AG

ITEC B.V.

Palomar Technologies, Inc.

Capcon Limited Co., Ltd.

All Ring Tech Co., Ltd.

Shenzhen Xinyichang Technology Co., Ltd.

Shenzhen S-King Intelligent Equipment Co., Ltd.

Quick Intelligent Equipment Co., Ltd.

Shenzhen Liande Automation Equipment Co., Ltd.

DongGuan Attach Point Intelligent Equipment Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Chip-to-Substrate Bonding Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Chip-to-Substrate Bonding Equipment, with price, sales quantity, revenue, and global market share of Chip-to-Substrate Bonding Equipment from 2021 to 2026.

Chapter 3, the Chip-to-Substrate Bonding Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Chip-to-Substrate Bonding Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Chip-to-Substrate Bonding Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Chip-to-Substrate Bonding Equipment.

Chapter 14 and 15, to describe Chip-to-Substrate Bonding Equipment sales channel, distributors, customers, research findings and conclusion.

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