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Global CoS Die-Bonder Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G7CE4F0841D6EN.html
Date: June 2026
Pages: 127
Price: US$ 4,480.00 (Single User License)
ID: G7CE4F0841D6EN

Abstracts

The global CoS Die-Bonder market size is expected to reach $ 276 million by 2032, rising at a market growth of 12.4% CAGR during the forecast period (2026-2032).

A CoS die bonder is a high-precision back-end core tool used in advanced packaging and high-end optoelectronic packaging. Its main function is to pick bare dies from wafers or incoming carriers and then place and bond them onto package substrates, interposers, wafers, carriers, or photonic device holders through vision recognition, positional compensation, flipping, heating, force control, ultrasonic bonding, or thermocompression processes, thereby solving problems such as fine-pitch interconnection, multi-die integration, thin-die handling, low thermal damage, production consistency, and in-line quality monitoring. Mainstream equipment has evolved from traditional single-function die attach platforms into compound platforms that can cover CoS, CoW, CoC, Flip Chip, TCB, multi-chip integration, and photonic chip hybrid integration. These systems serve FCBGA, FCCSP, SiP, MCM, Chiplet, HBM, 2.5D and 3D packaging, while also extending into silicon photonics, co-packaged optics, optical modules, lasers, sensors, and high-end power devices. Their core competitiveness is concentrated in sub-micron to several-micron placement accuracy, broad process compatibility, closed-loop force and temperature control, clean process environments, automatic recipe changeover, and process data visualization. In commercial delivery, suppliers typically provide the machine itself, tooling and software modules, process validation, production ramp support, and global service, forming a continuous solution path from R&D prototyping to high-volume manufacturing.

The industrial upgrading of CoS die bonders is essentially the result of advanced packaging shifting from a single die attach action toward a high-precision heterogeneous integration platform. As FCBGA, FCCSP, SiP, MCM, Chiplet, HBM,

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2.5D, and 3D packaging continue to move toward finer pitch, higher I O density, and stronger thermal reliability, the equipment is no longer required merely to transfer and place dies. Instead, it must simultaneously deliver vision alignment, motion control, closed-loop force and temperature control, material compatibility, and process monitoring within extremely short cycle times. Panasonic's MD-P300HS already combines low-temperature ultrasonic bonding, high accuracy, and real-time quality monitoring, while Yamaha's NeoForce series packages TCB, chip-to-substrate capability, and high bonding force into a standardized platform for next-generation packaging. Besi's 9800 TC next goes even further by explicitly defining chiplet and interposer applications in the product concept. This indicates that the competitive logic of CoS die bonders has shifted from single-point accuracy competition toward platform capability, multi-process coverage, and high-yield production performance.

From a competitive landscape perspective, the sector still shows a structure led by Europe and Japan, with South Korea and China accelerating their catch-up. European suppliers are strongest in ultra-high precision, multi-chip assembly, advanced thermocompression, and high-end optoelectronic packaging. ASMPT AMICRA represents sub-micron placement capability and advanced heterogeneous integration, Besi has a complete layout across multi-chip, flip chip, TCB, and high-force platforms, and Finetech and ficonTEC have each built differentiation in high-precision development-to-production migration and automated photonic assembly. Japanese companies stand out for multi-process know-how and engineering execution. Toray, Panasonic, Yamaha, and FOUR TECHNOS each have deep experience across CoS, CoW, TCB, optical communication modules, and multiple bonding routes. At the same time, Hanwha is already supplying equipment to global IDM and OSAT customers, while Guangzhou Nuoding has formed a more complete domestic product line in advanced packaging and flip-chip die bonding. This shows that regional competition is evolving from import substitution toward selective breakthroughs in higher-end segments.

Over the next few years, the most important growth drivers in this market will come from rising packaging complexity driven by advanced computing and high-speed interconnects, as well as the continued expansion of equipment requirements under electro-optical convergence. On one side, Chiplet, HBM, CPO, and silicon photonics are making higher accuracy, higher bonding force, lower thermal damage, and stronger process traceability into new baseline requirements, forcing equipment suppliers to strengthen thermal management, force control, clean process environments, and process data interfaces for production ramp. On the other side, customers increasingly want the same platform to cover R&D prototyping, NPI validation, and large-scale manufacturing, in order to compress process migration time and avoid inefficient capital

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spending. Finetech's modular platform, ficonTEC's Lab-to-Fab pathway, Mycronic's high-precision die bonding for photonics and co-packaging, and the expansion of Chinese suppliers into pre-sintering, flip chip, and multi-scenario integration all indicate that CoS die bonders are not a slowing single-function equipment segment. Instead, they remain an equipment track whose ceiling is still being raised by advanced packaging and optical communications.

This report studies the global CoS Die-Bonder production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CoS Die-Bonder and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of CoS Die-Bonder that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global CoS Die-Bonder total production and demand, 2021-2032, (Units)
Global CoS Die-Bonder total production value, 2021-2032, (USD Million)
Global CoS Die-Bonder production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global CoS Die-Bonder consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: CoS Die-Bonder domestic production, consumption, key domestic manufacturers and share
Global CoS Die-Bonder production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global CoS Die-Bonder production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global CoS Die-Bonder production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global CoS Die-Bonder market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASMPT Limited, Mycronic AB, Toray Industries, Inc., FUJI CORPORATION, Finetech GmbH & Co. KG, ficonTEC Service GmbH, BE Semiconductor Industries N.V., Kaijo Corporation, Panasonic Holdings Corporation, Yamaha Motor Co., Ltd., etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World CoS Die-Bonder market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Units) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global CoS Die-Bonder Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CoS Die-Bonder Market, Segmentation by Type:

Fully Automatic

Semi Automatic

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Global CoS Die-Bonder Market, Segmentation by Placement Accuracy Class:

Sub-Micron Class

High-Precision Class (1–3 ?m)

Mid-High Precision Class (>3–10 ?m)

Standard Precision Class (>10 ?m)

Global CoS Die-Bonder Market, Segmentation by Maximum Bond Force Class:

Low Force Class (?100 N)

Medium Force Class (>100–350 N)

High Force Class (>350–500 N)

Ultra-High Force Class (>500 N)

Global CoS Die-Bonder Market, Segmentation by Application:

SiPhotonics

Optical Device Packaging

Data Communication / 5G

3D Sensor / LiDAR

Augmented Reality

Companies Profiled:

ASMPT Limited

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Mycronic AB

Toray Industries, Inc.

FUJI CORPORATION

Finetech GmbH & Co. KG

ficonTEC Service GmbH

BE Semiconductor Industries N.V.

Kaijo Corporation

Panasonic Holdings Corporation

Yamaha Motor Co., Ltd.

Hanwha Semitech Co., Ltd.

Guangzhou Nuoding Intelligent Technology Co., Ltd.

FOUR TECHNOS Co., Ltd.

Key Questions Answered:
1. How big is the global CoS Die-Bonder market?
2. What is the demand of the global CoS Die-Bonder market?
3. What is the year over year growth of the global CoS Die-Bonder market?
4. What is the production and production value of the global CoS Die-Bonder market?
5. Who are the key producers in the global CoS Die-Bonder market?
6. What are the growth factors driving the market demand?

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