

# 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,

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

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.

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

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

Sub-Micron Class

High-Precision Class (1–3  $\mu$ m)

Mid-High Precision Class (>3–10  $\mu$ m)

Standard Precision Class (>10  $\mu$ m)

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

Low Force Class ( $\leq$ 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

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?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 CoS Die-Bonder Introduction
- 1.2 World CoS Die-Bonder Supply & Forecast
  - 1.2.1 World CoS Die-Bonder Production Value (2021 & 2025 & 2032)
  - 1.2.2 World CoS Die-Bonder Production (2021-2032)
  - 1.2.3 World CoS Die-Bonder Pricing Trends (2021-2032)
- 1.3 World CoS Die-Bonder Production by Region (Based on Production Site)
  - 1.3.1 World CoS Die-Bonder Production Value by Region (2021-2032)
  - 1.3.2 World CoS Die-Bonder Production by Region (2021-2032)
  - 1.3.3 World CoS Die-Bonder Average Price by Region (2021-2032)
  - 1.3.4 North America CoS Die-Bonder Production (2021-2032)
  - 1.3.5 Europe CoS Die-Bonder Production (2021-2032)
  - 1.3.6 China CoS Die-Bonder Production (2021-2032)
  - 1.3.7 Japan CoS Die-Bonder Production (2021-2032)
  - 1.3.8 South Korea CoS Die-Bonder Production (2021-2032)
  - 1.3.9 China Taiwan CoS Die-Bonder Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 CoS Die-Bonder Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 CoS Die-Bonder Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World CoS Die-Bonder Demand (2021-2032)
- 2.2 World CoS Die-Bonder Consumption by Region
  - 2.2.1 World CoS Die-Bonder Consumption by Region (2021-2026)
  - 2.2.2 World CoS Die-Bonder Consumption Forecast by Region (2027-2032)
- 2.3 United States CoS Die-Bonder Consumption (2021-2032)
- 2.4 China CoS Die-Bonder Consumption (2021-2032)
- 2.5 Europe CoS Die-Bonder Consumption (2021-2032)
- 2.6 Japan CoS Die-Bonder Consumption (2021-2032)
- 2.7 South Korea CoS Die-Bonder Consumption (2021-2032)
- 2.8 ASEAN CoS Die-Bonder Consumption (2021-2032)
- 2.9 India CoS Die-Bonder Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World CoS Die-Bonder Production Value by Manufacturer (2021-2026)
- 3.2 World CoS Die-Bonder Production by Manufacturer (2021-2026)
- 3.3 World CoS Die-Bonder Average Price by Manufacturer (2021-2026)
- 3.4 CoS Die-Bonder Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global CoS Die-Bonder Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for CoS Die-Bonder in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for CoS Die-Bonder in 2025
- 3.6 CoS Die-Bonder Market: Overall Company Footprint Analysis
  - 3.6.1 CoS Die-Bonder Market: Region Footprint
  - 3.6.2 CoS Die-Bonder Market: Company Product Type Footprint
  - 3.6.3 CoS Die-Bonder Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: CoS Die-Bonder Production Value Comparison
  - 4.1.1 United States VS China: CoS Die-Bonder Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: CoS Die-Bonder Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: CoS Die-Bonder Production Comparison
  - 4.2.1 United States VS China: CoS Die-Bonder Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: CoS Die-Bonder Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: CoS Die-Bonder Consumption Comparison
  - 4.3.1 United States VS China: CoS Die-Bonder Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: CoS Die-Bonder Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based CoS Die-Bonder Manufacturers and Market Share, 2021-2026
  - 4.4.1 United States Based CoS Die-Bonder Manufacturers, Headquarters and

## Production Site (States, Country)

4.4.2 United States Based Manufacturers CoS Die-Bonder Production Value (2021-2026)

4.4.3 United States Based Manufacturers CoS Die-Bonder Production (2021-2026)

## 4.5 China Based CoS Die-Bonder Manufacturers and Market Share

4.5.1 China Based CoS Die-Bonder Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers CoS Die-Bonder Production Value (2021-2026)

4.5.3 China Based Manufacturers CoS Die-Bonder Production (2021-2026)

## 4.6 Rest of World Based CoS Die-Bonder Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based CoS Die-Bonder Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers CoS Die-Bonder Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers CoS Die-Bonder Production (2021-2026)

## 5 MARKET ANALYSIS BY TYPE

5.1 World CoS Die-Bonder Market Size Overview by Type: 2021 VS 2025 VS 2032

### 5.2 Segment Introduction by Type

5.2.1 Fully Automatic

5.2.2 Semi Automatic

### 5.3 Market Segment by Type

5.3.1 World CoS Die-Bonder Production by Type (2021-2032)

5.3.2 World CoS Die-Bonder Production Value by Type (2021-2032)

5.3.3 World CoS Die-Bonder Average Price by Type (2021-2032)

## 6 MARKET ANALYSIS BY PLACEMENT ACCURACY CLASS

6.1 World CoS Die-Bonder Market Size Overview by Placement Accuracy Class: 2021 VS 2025 VS 2032

### 6.2 Segment Introduction by Placement Accuracy Class

6.2.1 Sub-Micron Class

6.2.2 High-Precision Class (1–3 ?m)

6.2.3 Mid-High Precision Class (>3–10 ?m)

6.2.4 Standard Precision Class (>10 ?m)

### 6.3 Market Segment by Placement Accuracy Class

6.3.1 World CoS Die-Bonder Production by Placement Accuracy Class (2021-2032)

6.3.2 World CoS Die-Bonder Production Value by Placement Accuracy Class

(2021-2032)

6.3.3 World CoS Die-Bonder Average Price by Placement Accuracy Class

(2021-2032)

## **7 MARKET ANALYSIS BY MAXIMUM BOND FORCE CLASS**

7.1 World CoS Die-Bonder Market Size Overview by Maximum Bond Force Class: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Maximum Bond Force Class

7.2.1 Low Force Class (?100 N)

7.2.2 Medium Force Class (>100–350 N)

7.2.3 High Force Class (>350–500 N)

7.2.4 Ultra-High Force Class (>500 N)

7.3 Market Segment by Maximum Bond Force Class

7.3.1 World CoS Die-Bonder Production by Maximum Bond Force Class (2021-2032)

7.3.2 World CoS Die-Bonder Production Value by Maximum Bond Force Class (2021-2032)

7.3.3 World CoS Die-Bonder Average Price by Maximum Bond Force Class (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World CoS Die-Bonder Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 SiPhotonics

8.2.2 Optical Device Packaging

8.2.3 Data Communication / 5G

8.2.4 3D Sensor / LiDAR

8.2.5 Augmented Reality

8.3 Market Segment by Application

8.3.1 World CoS Die-Bonder Production by Application (2021-2032)

8.3.2 World CoS Die-Bonder Production Value by Application (2021-2032)

8.3.3 World CoS Die-Bonder Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 ASMPT Limited

9.1.1 ASMPT Limited Details

- 9.1.2 ASMPT Limited Major Business
- 9.1.3 ASMPT Limited CoS Die-Bonder Product and Services
- 9.1.4 ASMPT Limited CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 ASMPT Limited Recent Developments/Updates
- 9.1.6 ASMPT Limited Competitive Strengths & Weaknesses
- 9.2 Mycronic AB
  - 9.2.1 Mycronic AB Details
  - 9.2.2 Mycronic AB Major Business
  - 9.2.3 Mycronic AB CoS Die-Bonder Product and Services
  - 9.2.4 Mycronic AB CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.2.5 Mycronic AB Recent Developments/Updates
  - 9.2.6 Mycronic AB Competitive Strengths & Weaknesses
- 9.3 Toray Industries, Inc.
  - 9.3.1 Toray Industries, Inc. Details
  - 9.3.2 Toray Industries, Inc. Major Business
  - 9.3.3 Toray Industries, Inc. CoS Die-Bonder Product and Services
  - 9.3.4 Toray Industries, Inc. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Toray Industries, Inc. Recent Developments/Updates
  - 9.3.6 Toray Industries, Inc. Competitive Strengths & Weaknesses
- 9.4 FUJI CORPORATION
  - 9.4.1 FUJI CORPORATION Details
  - 9.4.2 FUJI CORPORATION Major Business
  - 9.4.3 FUJI CORPORATION CoS Die-Bonder Product and Services
  - 9.4.4 FUJI CORPORATION CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 FUJI CORPORATION Recent Developments/Updates
  - 9.4.6 FUJI CORPORATION Competitive Strengths & Weaknesses
- 9.5 Finetech GmbH & Co. KG
  - 9.5.1 Finetech GmbH & Co. KG Details
  - 9.5.2 Finetech GmbH & Co. KG Major Business
  - 9.5.3 Finetech GmbH & Co. KG CoS Die-Bonder Product and Services
  - 9.5.4 Finetech GmbH & Co. KG CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 Finetech GmbH & Co. KG Recent Developments/Updates
  - 9.5.6 Finetech GmbH & Co. KG Competitive Strengths & Weaknesses
- 9.6 ficonTEC Service GmbH

- 9.6.1 ficonTEC Service GmbH Details
- 9.6.2 ficonTEC Service GmbH Major Business
- 9.6.3 ficonTEC Service GmbH CoS Die-Bonder Product and Services
- 9.6.4 ficonTEC Service GmbH CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 ficonTEC Service GmbH Recent Developments/Updates
- 9.6.6 ficonTEC Service GmbH Competitive Strengths & Weaknesses
- 9.7 BE Semiconductor Industries N.V.
  - 9.7.1 BE Semiconductor Industries N.V. Details
  - 9.7.2 BE Semiconductor Industries N.V. Major Business
  - 9.7.3 BE Semiconductor Industries N.V. CoS Die-Bonder Product and Services
  - 9.7.4 BE Semiconductor Industries N.V. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 BE Semiconductor Industries N.V. Recent Developments/Updates
  - 9.7.6 BE Semiconductor Industries N.V. Competitive Strengths & Weaknesses
- 9.8 Kaijo Corporation
  - 9.8.1 Kaijo Corporation Details
  - 9.8.2 Kaijo Corporation Major Business
  - 9.8.3 Kaijo Corporation CoS Die-Bonder Product and Services
  - 9.8.4 Kaijo Corporation CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 Kaijo Corporation Recent Developments/Updates
  - 9.8.6 Kaijo Corporation Competitive Strengths & Weaknesses
- 9.9 Panasonic Holdings Corporation
  - 9.9.1 Panasonic Holdings Corporation Details
  - 9.9.2 Panasonic Holdings Corporation Major Business
  - 9.9.3 Panasonic Holdings Corporation CoS Die-Bonder Product and Services
  - 9.9.4 Panasonic Holdings Corporation CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Panasonic Holdings Corporation Recent Developments/Updates
  - 9.9.6 Panasonic Holdings Corporation Competitive Strengths & Weaknesses
- 9.10 Yamaha Motor Co., Ltd.
  - 9.10.1 Yamaha Motor Co., Ltd. Details
  - 9.10.2 Yamaha Motor Co., Ltd. Major Business
  - 9.10.3 Yamaha Motor Co., Ltd. CoS Die-Bonder Product and Services
  - 9.10.4 Yamaha Motor Co., Ltd. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.10.5 Yamaha Motor Co., Ltd. Recent Developments/Updates
  - 9.10.6 Yamaha Motor Co., Ltd. Competitive Strengths & Weaknesses

## 9.11 Hanwha Semitech Co., Ltd.

9.11.1 Hanwha Semitech Co., Ltd. Details

9.11.2 Hanwha Semitech Co., Ltd. Major Business

9.11.3 Hanwha Semitech Co., Ltd. CoS Die-Bonder Product and Services

9.11.4 Hanwha Semitech Co., Ltd. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Hanwha Semitech Co., Ltd. Recent Developments/Updates

9.11.6 Hanwha Semitech Co., Ltd. Competitive Strengths & Weaknesses

## 9.12 Guangzhou Nuoding Intelligent Technology Co., Ltd.

9.12.1 Guangzhou Nuoding Intelligent Technology Co., Ltd. Details

9.12.2 Guangzhou Nuoding Intelligent Technology Co., Ltd. Major Business

9.12.3 Guangzhou Nuoding Intelligent Technology Co., Ltd. CoS Die-Bonder Product and Services

9.12.4 Guangzhou Nuoding Intelligent Technology Co., Ltd. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Guangzhou Nuoding Intelligent Technology Co., Ltd. Recent Developments/Updates

9.12.6 Guangzhou Nuoding Intelligent Technology Co., Ltd. Competitive Strengths & Weaknesses

## 9.13 FOUR TECHNOS Co., Ltd.

9.13.1 FOUR TECHNOS Co., Ltd. Details

9.13.2 FOUR TECHNOS Co., Ltd. Major Business

9.13.3 FOUR TECHNOS Co., Ltd. CoS Die-Bonder Product and Services

9.13.4 FOUR TECHNOS Co., Ltd. CoS Die-Bonder Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 FOUR TECHNOS Co., Ltd. Recent Developments/Updates

9.13.6 FOUR TECHNOS Co., Ltd. Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

### 10.1 CoS Die-Bonder Industry Chain

### 10.2 CoS Die-Bonder Upstream Analysis

10.2.1 CoS Die-Bonder Core Raw Materials

10.2.2 Main Manufacturers of CoS Die-Bonder Core Raw Materials

### 10.3 Midstream Analysis

### 10.4 Downstream Analysis

### 10.5 CoS Die-Bonder Production Mode

### 10.6 CoS Die-Bonder Procurement Model

### 10.7 CoS Die-Bonder Industry Sales Model and Sales Channels

- 10.7.1 CoS Die-Bonder Sales Model
- 10.7.2 CoS Die-Bonder Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. World CoS Die-Bonder Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World CoS Die-Bonder Production Value by Region (2021-2026) & (USD Million)
- Table 3. World CoS Die-Bonder Production Value by Region (2027-2032) & (USD Million)
- Table 4. World CoS Die-Bonder Production Value Market Share by Region (2021-2026)
- Table 5. World CoS Die-Bonder Production Value Market Share by Region (2027-2032)
- Table 6. World CoS Die-Bonder Production by Region (2021-2026) & (Units)
- Table 7. World CoS Die-Bonder Production by Region (2027-2032) & (Units)
- Table 8. World CoS Die-Bonder Production Market Share by Region (2021-2026)
- Table 9. World CoS Die-Bonder Production Market Share by Region (2027-2032)
- Table 10. World CoS Die-Bonder Average Price by Region (2021-2026) & (US\$/Units)
- Table 11. World CoS Die-Bonder Average Price by Region (2027-2032) & (US\$/Units)
- Table 12. CoS Die-Bonder Major Market Trends
- Table 13. World CoS Die-Bonder Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World CoS Die-Bonder Consumption by Region (2021-2026) & (Units)
- Table 15. World CoS Die-Bonder Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World CoS Die-Bonder Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key CoS Die-Bonder Producers in 2025
- Table 18. World CoS Die-Bonder Production by Manufacturer (2021-2026) & (Units)
- Table 19. Production Market Share of Key CoS Die-Bonder Producers in 2025
- Table 20. World CoS Die-Bonder Average Price by Manufacturer (2021-2026) & (US\$/Units)
- Table 21. Global CoS Die-Bonder Company Evaluation Quadrant
- Table 22. World CoS Die-Bonder Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and CoS Die-Bonder Production Site of Key Manufacturer
- Table 24. CoS Die-Bonder Market: Company Product Type Footprint
- Table 25. CoS Die-Bonder Market: Company Product Application Footprint
- Table 26. CoS Die-Bonder Competitive Factors
- Table 27. CoS Die-Bonder New Entrant and Capacity Expansion Plans

Table 28. CoS Die-Bonder Mergers & Acquisitions Activity

Table 29. United States VS China CoS Die-Bonder Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China CoS Die-Bonder Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China CoS Die-Bonder Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based CoS Die-Bonder Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers CoS Die-Bonder Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers CoS Die-Bonder Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers CoS Die-Bonder Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers CoS Die-Bonder Production Market Share (2021-2026)

Table 37. China Based CoS Die-Bonder Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers CoS Die-Bonder Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers CoS Die-Bonder Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers CoS Die-Bonder Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers CoS Die-Bonder Production Market Share (2021-2026)

Table 42. Rest of World Based CoS Die-Bonder Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers CoS Die-Bonder Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers CoS Die-Bonder Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers CoS Die-Bonder Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers CoS Die-Bonder Production Market Share (2021-2026)

Table 47. World CoS Die-Bonder Production Value by Type, (USD Million), 2021 & 2025 & 2032

- Table 48. World CoS Die-Bonder Production by Type (2021-2026) & (Units)
- Table 49. World CoS Die-Bonder Production by Type (2027-2032) & (Units)
- Table 50. World CoS Die-Bonder Production Value by Type (2021-2026) & (USD Million)
- Table 51. World CoS Die-Bonder Production Value by Type (2027-2032) & (USD Million)
- Table 52. World CoS Die-Bonder Average Price by Type (2021-2026) & (US\$/Units)
- Table 53. World CoS Die-Bonder Average Price by Type (2027-2032) & (US\$/Units)
- Table 54. World CoS Die-Bonder Production Value by Placement Accuracy Class, (USD Million), 2021 & 2025 & 2032
- Table 55. World CoS Die-Bonder Production by Placement Accuracy Class (2021-2026) & (Units)
- Table 56. World CoS Die-Bonder Production by Placement Accuracy Class (2027-2032) & (Units)
- Table 57. World CoS Die-Bonder Production Value by Placement Accuracy Class (2021-2026) & (USD Million)
- Table 58. World CoS Die-Bonder Production Value by Placement Accuracy Class (2027-2032) & (USD Million)
- Table 59. World CoS Die-Bonder Average Price by Placement Accuracy Class (2021-2026) & (US\$/Units)
- Table 60. World CoS Die-Bonder Average Price by Placement Accuracy Class (2027-2032) & (US\$/Units)
- Table 61. World CoS Die-Bonder Production Value by Maximum Bond Force Class, (USD Million), 2021 & 2025 & 2032
- Table 62. World CoS Die-Bonder Production by Maximum Bond Force Class (2021-2026) & (Units)
- Table 63. World CoS Die-Bonder Production by Maximum Bond Force Class (2027-2032) & (Units)
- Table 64. World CoS Die-Bonder Production Value by Maximum Bond Force Class (2021-2026) & (USD Million)
- Table 65. World CoS Die-Bonder Production Value by Maximum Bond Force Class (2027-2032) & (USD Million)
- Table 66. World CoS Die-Bonder Average Price by Maximum Bond Force Class (2021-2026) & (US\$/Units)
- Table 67. World CoS Die-Bonder Average Price by Maximum Bond Force Class (2027-2032) & (US\$/Units)
- Table 68. World CoS Die-Bonder Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 69. World CoS Die-Bonder Production by Application (2021-2026) & (Units)

Table 70. World CoS Die-Bonder Production by Application (2027-2032) & (Units)

Table 71. World CoS Die-Bonder Production Value by Application (2021-2026) & (USD Million)

Table 72. World CoS Die-Bonder Production Value by Application (2027-2032) & (USD Million)

Table 73. World CoS Die-Bonder Average Price by Application (2021-2026) & (US\$/Units)

Table 74. World CoS Die-Bonder Average Price by Application (2027-2032) & (US\$/Units)

Table 75. ASMPT Limited Basic Information, Manufacturing Base and Competitors

Table 76. ASMPT Limited Major Business

Table 77. ASMPT Limited CoS Die-Bonder Product and Services

Table 78. ASMPT Limited CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. ASMPT Limited Recent Developments/Updates

Table 80. ASMPT Limited Competitive Strengths & Weaknesses

Table 81. Mycronic AB Basic Information, Manufacturing Base and Competitors

Table 82. Mycronic AB Major Business

Table 83. Mycronic AB CoS Die-Bonder Product and Services

Table 84. Mycronic AB CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Mycronic AB Recent Developments/Updates

Table 86. Mycronic AB Competitive Strengths & Weaknesses

Table 87. Toray Industries, Inc. Basic Information, Manufacturing Base and Competitors

Table 88. Toray Industries, Inc. Major Business

Table 89. Toray Industries, Inc. CoS Die-Bonder Product and Services

Table 90. Toray Industries, Inc. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Toray Industries, Inc. Recent Developments/Updates

Table 92. Toray Industries, Inc. Competitive Strengths & Weaknesses

Table 93. FUJI CORPORATION Basic Information, Manufacturing Base and Competitors

Table 94. FUJI CORPORATION Major Business

Table 95. FUJI CORPORATION CoS Die-Bonder Product and Services

Table 96. FUJI CORPORATION CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. FUJI CORPORATION Recent Developments/Updates

Table 98. FUJI CORPORATION Competitive Strengths & Weaknesses

Table 99. Finetech GmbH & Co. KG Basic Information, Manufacturing Base and

## Competitors

Table 100. Finetech GmbH & Co. KG Major Business

Table 101. Finetech GmbH & Co. KG CoS Die-Bonder Product and Services

Table 102. Finetech GmbH & Co. KG CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Finetech GmbH & Co. KG Recent Developments/Updates

Table 104. Finetech GmbH & Co. KG Competitive Strengths & Weaknesses

Table 105. ficonTEC Service GmbH Basic Information, Manufacturing Base and Competitors

Table 106. ficonTEC Service GmbH Major Business

Table 107. ficonTEC Service GmbH CoS Die-Bonder Product and Services

Table 108. ficonTEC Service GmbH CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. ficonTEC Service GmbH Recent Developments/Updates

Table 110. ficonTEC Service GmbH Competitive Strengths & Weaknesses

Table 111. BE Semiconductor Industries N.V. Basic Information, Manufacturing Base and Competitors

Table 112. BE Semiconductor Industries N.V. Major Business

Table 113. BE Semiconductor Industries N.V. CoS Die-Bonder Product and Services

Table 114. BE Semiconductor Industries N.V. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. BE Semiconductor Industries N.V. Recent Developments/Updates

Table 116. BE Semiconductor Industries N.V. Competitive Strengths & Weaknesses

Table 117. Kaijo Corporation Basic Information, Manufacturing Base and Competitors

Table 118. Kaijo Corporation Major Business

Table 119. Kaijo Corporation CoS Die-Bonder Product and Services

Table 120. Kaijo Corporation CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Kaijo Corporation Recent Developments/Updates

Table 122. Kaijo Corporation Competitive Strengths & Weaknesses

Table 123. Panasonic Holdings Corporation Basic Information, Manufacturing Base and Competitors

Table 124. Panasonic Holdings Corporation Major Business

Table 125. Panasonic Holdings Corporation CoS Die-Bonder Product and Services

Table 126. Panasonic Holdings Corporation CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 127. Panasonic Holdings Corporation Recent Developments/Updates

Table 128. Panasonic Holdings Corporation Competitive Strengths & Weaknesses

Table 129. Yamaha Motor Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 130. Yamaha Motor Co., Ltd. Major Business

Table 131. Yamaha Motor Co., Ltd. CoS Die-Bonder Product and Services

Table 132. Yamaha Motor Co., Ltd. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Yamaha Motor Co., Ltd. Recent Developments/Updates

Table 134. Yamaha Motor Co., Ltd. Competitive Strengths & Weaknesses

Table 135. Hanwha Semitech Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 136. Hanwha Semitech Co., Ltd. Major Business

Table 137. Hanwha Semitech Co., Ltd. CoS Die-Bonder Product and Services

Table 138. Hanwha Semitech Co., Ltd. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Hanwha Semitech Co., Ltd. Recent Developments/Updates

Table 140. Hanwha Semitech Co., Ltd. Competitive Strengths & Weaknesses

Table 141. Guangzhou Nuoding Intelligent Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Guangzhou Nuoding Intelligent Technology Co., Ltd. Major Business

Table 143. Guangzhou Nuoding Intelligent Technology Co., Ltd. CoS Die-Bonder Product and Services

Table 144. Guangzhou Nuoding Intelligent Technology Co., Ltd. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Guangzhou Nuoding Intelligent Technology Co., Ltd. Recent Developments/Updates

Table 146. Guangzhou Nuoding Intelligent Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 147. FOUR TECHNOS Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. FOUR TECHNOS Co., Ltd. Major Business

Table 149. FOUR TECHNOS Co., Ltd. CoS Die-Bonder Product and Services

Table 150. FOUR TECHNOS Co., Ltd. CoS Die-Bonder Production (Units), Price (US\$/Units), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 151. FOUR TECHNOS Co., Ltd. Recent Developments/Updates

Table 152. FOUR TECHNOS Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Global Key Players of CoS Die-Bonder Upstream (Raw Materials)

Table 154. Global CoS Die-Bonder Typical Customers

Table 155. CoS Die-Bonder Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. CoS Die-Bonder Picture

Figure 2. World CoS Die-Bonder Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World CoS Die-Bonder Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World CoS Die-Bonder Production (2021-2032) & (Units)

Figure 5. World CoS Die-Bonder Average Price (2021-2032) & (US\$/Units)

Figure 6. World CoS Die-Bonder Production Value Market Share by Region (2021-2032)

Figure 7. World CoS Die-Bonder Production Market Share by Region (2021-2032)

Figure 8. North America CoS Die-Bonder Production (2021-2032) & (Units)

Figure 9. Europe CoS Die-Bonder Production (2021-2032) & (Units)

Figure 10. China CoS Die-Bonder Production (2021-2032) & (Units)

Figure 11. Japan CoS Die-Bonder Production (2021-2032) & (Units)

Figure 12. South Korea CoS Die-Bonder Production (2021-2032) & (Units)

Figure 13. China Taiwan CoS Die-Bonder Production (2021-2032) & (Units)

Figure 14. CoS Die-Bonder Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 17. World CoS Die-Bonder Consumption Market Share by Region (2021-2032)

Figure 18. United States CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 19. China CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 20. Europe CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 21. Japan CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 22. South Korea CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 23. ASEAN CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 24. India CoS Die-Bonder Consumption (2021-2032) & (Units)

Figure 25. Producer Shipments of CoS Die-Bonder by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for CoS Die-Bonder Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for CoS Die-Bonder Markets in 2025

Figure 28. United States VS China: CoS Die-Bonder Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: CoS Die-Bonder Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: CoS Die-Bonder Consumption Market Share

Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers CoS Die-Bonder Production Market Share 2025

Figure 32. China Based Manufacturers CoS Die-Bonder Production Market Share 2025

Figure 33. Rest of World Based Manufacturers CoS Die-Bonder Production Market Share 2025

Figure 34. World CoS Die-Bonder Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World CoS Die-Bonder Production Value Market Share by Type in 2025

Figure 36. Fully Automatic

Figure 37. Semi Automatic

Figure 38. World CoS Die-Bonder Production Market Share by Type (2021-2032)

Figure 39. World CoS Die-Bonder Production Value Market Share by Type (2021-2032)

Figure 40. World CoS Die-Bonder Average Price by Type (2021-2032) & (US\$/Units)

Figure 41. World CoS Die-Bonder Production Value by Placement Accuracy Class, (USD Million), 2021 & 2025 & 2032

Figure 42. World CoS Die-Bonder Production Value Market Share by Placement Accuracy Class in 2025

Figure 43. Sub-Micron Class

Figure 44. High-Precision Class (1–3 ?m)

Figure 45. Mid-High Precision Class (>3–10 ?m)

Figure 46. Standard Precision Class (>10 ?m)

Figure 47. World CoS Die-Bonder Production Market Share by Placement Accuracy Class (2021-2032)

Figure 48. World CoS Die-Bonder Production Value Market Share by Placement Accuracy Class (2021-2032)

Figure 49. World CoS Die-Bonder Average Price by Placement Accuracy Class (2021-2032) & (US\$/Units)

Figure 50. World CoS Die-Bonder Production Value by Maximum Bond Force Class, (USD Million), 2021 & 2025 & 2032

Figure 51. World CoS Die-Bonder Production Value Market Share by Maximum Bond Force Class in 2025

Figure 52. Low Force Class (?100 N)

Figure 53. Medium Force Class (>100–350 N)

Figure 54. High Force Class (>350–500 N)

Figure 55. Ultra-High Force Class (>500 N)

Figure 56. World CoS Die-Bonder Production Market Share by Maximum Bond Force

Class (2021-2032)

Figure 57. World CoS Die-Bonder Production Value Market Share by Maximum Bond Force Class (2021-2032)

Figure 58. World CoS Die-Bonder Average Price by Maximum Bond Force Class (2021-2032) & (US\$/Units)

Figure 59. World CoS Die-Bonder Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 60. World CoS Die-Bonder Production Value Market Share by Application in 2025

Figure 61. SiPhotonics

Figure 62. Optical Device Packaging

Figure 63. Data Communication / 5G

Figure 64. 3D Sensor / LiDAR

Figure 65. Augmented Reality

Figure 66. World CoS Die-Bonder Production Market Share by Application (2021-2032)

Figure 67. World CoS Die-Bonder Production Value Market Share by Application (2021-2032)

Figure 68. World CoS Die-Bonder Average Price by Application (2021-2032) & (US\$/Units)

Figure 69. CoS Die-Bonder Industry Chain

Figure 70. CoS Die-Bonder Procurement Model

Figure 71. CoS Die-Bonder Sales Model

Figure 72. CoS Die-Bonder Sales Channels, Direct Sales, and Distribution

Figure 73. Methodology

Figure 74. Research Process and Data Source

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