Global Laser Chip COS (Chip on Submount) Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Laser Chip COS (Chip on Submount) Equipment market size is expected to reach $ 300 million by 2032, rising at a market growth of 11.3% CAGR during the forecast period (2026-2032).

Laser chip COS equipment refers to high-precision back-end assembly equipment used for packaging laser diodes, VCSELs, photodiodes, silicon photonics chips, and high-power laser chips. Its core task is to reliably attach bare laser chips or optoelectronic chips onto submounts, carriers, ceramic substrates, metal heat sinks, or module carriers, thereby addressing optical-axis positioning, thermal-resistance control, bonding voids, placement consistency, and mass-production yield. This type of equipment typically integrates high-precision motion stages, dynamic vision recognition, die pick-up, flip-chip or face-up placement, bond-force control, pulse heating, localized laser heating, eutectic soldering, epoxy dispensing or stamping, UV curing, process logging, and post-bond inspection. Typical processes include AuSn eutectic bonding, solder reflow, thermo-compression bonding, epoxy die attach, flip-chip bonding, and sequential multi-die placement. Typical applications cover COC, COS, COB, P-side-down laser diode attachment, VCSEL modules, optical transceiver modules, data-center AOC, silicon photonics packaging, high-power fiber-laser pump sources, LiDAR, and precision optoelectronic sensing. Major customers include laser-chip manufacturers, optical-module producers, silicon photonics packaging companies, LiDAR transmitter manufacturers, high-power laser manufacturers, advanced packaging houses, and research or pilot-production platforms. Commercial delivery is mainly based on equipment sales, supplemented by process development, fixture customization, automated loading and unloading, testing and sorting, software traceability, spare-parts maintenance, and production-line integration services.

Laser chip COS equipment occupies the most critical high-precision back-end assembly position in the optoelectronic packaging value chain. It is not a general-purpose placement machine, but a piece of equipment built around coordinated thermal, optical, electrical, and mechanical control from the laser chip to the submount or carrier. Compared with ordinary die bonders, this type of equipment must simultaneously address small-die pick-up, optical-axis edge alignment, stable bonding force, uniform AuSn eutectic bond lines, heat-sink thermal paths, and post-bond visual inspection. Therefore, equipment capability is typically reflected in placement accuracy, cycle time, temperature control, force range, chip-size compatibility, sequential multi-die placement, and process-data traceability. ASMPT AMICRA CoS directly defines its system as a dedicated platform for Chip on Submount applications, with ±1.5µm-level accuracy, 6 to 10 second cycle time, laser or pulse heating, epoxy stamping, and post-bond inspection. Mycronic MRSI links high-precision die bonders with CoC, CoS, and CoB assembly, eutectic and epoxy processes, high-speed tool change, and parallel processing, indicating that the industry is upgrading from point placement to flexible volume-production platforms.

From a competitive-landscape perspective, European, American, and Japanese companies still lead in high precision, photonics packaging experience, and process ecosystems. ASMPT AMICRA, Mycronic MRSI, Palomar, ficonTEC, Finetech, and SET cover dedicated CoS equipment, photonic-device assembly platforms, laser-diode placement cases, and R&D or pilot-line flip-chip bonders. Palomar 6500 clearly supports P-side-down laser diode attachment, VCSEL modules, and optoelectronic packaging, while ficonTEC emphasizes motion control, active alignment, multiple bonding methods, and electro-optical testing in photonic micro-assembly. Japan’s Shibuya FDB210/211 is directly positioned for optical communication and optical devices, covering laser diode bonding, sub-mount bonding, and silicon photonics bonding with ±2µm accuracy. By contrast, mainland Chinese companies are entering the market through eutectic bonders, optical-module die bonders, and COC/COS-specific processes. Bozhon, Microview, and Lieqi all show COC/COS application descriptions on their product pages, indicating that domestic equipment is accelerating its shift from general die attach toward optical-communication-specific packaging.

From the demand side, the long-term growth logic for laser chip COS equipment comes from optical-communication speed upgrades, data-center optical interconnect expansion, increasing silicon-photonics packaging complexity, growth in VCSEL and LiDAR sensing devices, and continuous iteration of high-power industrial laser modules. Downstream customer requirements are expanding from placement accuracy alone to full-process yield, process traceability, automated loading and unloading, high-mix product switching, and closed-loop testing. FitTech’s COC-COS testing and sorting system shows that a COS production line now requires not only bonding equipment, but also LIV, Far Field, high-temperature measurement, and package-level testing and sorting equipment. ficonTEC’s page also shows that photonic-device manufacturing is moving toward more automated production systems that integrate die-level assembly, package-level testing, electro-optical testing, and statistical traceability. Future industry opportunities are more likely to concentrate in high-precision eutectic bonding, photonic-device active alignment, silicon photonics and optical-module volume packaging, domestic substitution, and turnkey line-delivery capability, rather than price competition in low-end standalone placement machines.

This report studies the global Laser Chip COS (Chip on Submount) Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Laser Chip COS (Chip on Submount) Equipment 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 Laser Chip COS (Chip on Submount) Equipment that contribute to its increasing demand across many markets.

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

production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Laser Chip COS (Chip on Submount) Equipment 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 Ltd, Mycronic AB, Palomar Technologies, Inc., ficonTEC Service GmbH, Dr. Tresky AG, Finetech GmbH & Co. KG, SET Corporation SA, Shibuya Corporation, Toray Engineering Co., Ltd., Yuasa Electronics 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 Laser Chip COS (Chip on Submount) Equipment 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 Laser Chip COS (Chip on Submount) Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Laser Chip COS (Chip on Submount) Equipment Market, Segmentation by Type:

Fully Automatic

Semi-Automatic

Global Laser Chip COS (Chip on Submount) Equipment Market, Segmentation by Bonding Process Route:

Eutectic Or Solder Bonding

Epoxy Or Adhesive Bonding

Thermo-Compression Or Flip-Chip Bonding

Testing And Inspection Only

Global Laser Chip COS (Chip on Submount) Equipment Market, Segmentation by Heating And Energy Input Method:

Pulse Heating

Localized Laser Heating

Heated Stage Or Thermo-Compression Heating

Non-Bonding Measurement Input

Global Laser Chip COS (Chip on Submount) Equipment Market, Segmentation by Application:

Optical Communication Device Packaging

Data Center Optical Interconnect Packaging

Industrial And Medical High-Power Laser Packaging

Automotive And Consumer 3D Sensing Packaging

Research And Process Development Packaging

Companies Profiled:

ASMPT Ltd

Mycronic AB

Palomar Technologies, Inc.

ficonTEC Service GmbH

Dr. Tresky AG

Finetech GmbH & Co. KG

SET Corporation SA

Shibuya Corporation

Toray Engineering Co., Ltd.

Yuasa Electronics Co., Ltd.

Alphax Co., Ltd.

Hanwha Precision Machinery Co., Ltd.

Bozhon Precision Industry Technology Co., Ltd.

Microview Intelligent Packaging Technology (Shenzhen) Co., Ltd.

Suzhou Lieqi Intelligent Equipment Co., Ltd.

FitTech Co., Ltd.

Kulicke and Soffa Industries, Inc.

BE Semiconductor Industries N.V.

Key Questions Answered:
1. How big is the global Laser Chip COS (Chip on Submount) Equipment market?
2. What is the demand of the global Laser Chip COS (Chip on Submount) Equipment market?
3. What is the year over year growth of the global Laser Chip COS (Chip on Submount) Equipment market?
4. What is the production and production value of the global Laser Chip COS (Chip on Submount) Equipment market?
5. Who are the key producers in the global Laser Chip COS (Chip on Submount) Equipment market?
6. What are the growth factors driving the market demand?

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