

Global Package-Substrate C2S Bonder 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 Package-Substrate C2S Bonder market size was valued at US\$ 381 million in 2025 and is forecast to a readjusted size of US\$ 738 million by 2032 with a CAGR of 9.8% during review period.

A Chip-to-Package-Substrate Bonder is a core advanced packaging tool used to accurately place and bond bare dies, chiplets, or singulated semiconductor devices onto organic package substrates, mainly for C2S thermo-compression bonding, flip-chip bonding, copper-pillar micro-bump bonding, and heterogeneous multi-die integration. The system typically consists of die feeding modules, flip-and-pick mechanisms, high-precision vision alignment, package-substrate handling stages, thermo-compression bonding heads, force and temperature control systems, flux or fluxless process modules, in-line inspection, and process traceability software. Key specifications include placement accuracy, bonding force, thermal uniformity, substrate warpage compensation, cycle time, supported die size, and multi-die layout capability. Major applications include AI accelerators, HPC processors, GPUs, ASICs, HBM-related packages, 2.5D packaging, chiplet packaging, and high-end flip-chip packages. Major production and supply bases include Singapore, the Netherlands, Japan, South Korea, Germany, Switzerland, the United States, mainland China, and Taiwan, China.

In 2025, global production of Chip-to-Package-Substrate Bonders reached approximately 90-115 units, with mainstream production-class systems priced at an average FOB range of USD 2.8-4.3 million per unit. Large-format C2S thermo-compression bonders for AI and HPC advanced packaging were priced above conventional flip-chip bonding platforms, mainly due to higher requirements for placement accuracy, bonding-force range, thermo-compression temperature control,

substrate warpage compensation, dual-track or multi-station architecture, in-line inspection, and customer-specific automation configurations.

Against the backdrop of rapid expansion in AI computing, high-performance computing, chiplets, HBM, and 2.5D packaging, Chip-to-Package-Substrate Bonders are becoming a key incremental equipment category in advanced packaging lines. Compared with conventional die attach tools, these systems not only place dies but also directly affect micro-bump or copper-pillar contact quality, package-substrate warpage control, thermo-mechanical stress distribution, and final package yield. As large logic dies, multi-die modules, and heterogeneous integration structures become more complex, customer requirements are shifting from throughput alone toward placement accuracy, thermo-compression consistency, force-control stability, in-line inspection, process data traceability, and line-level automation. In the coming years, leading OSATs, foundry advanced packaging units, IDMs, and memory manufacturers will remain the main buyers of C2S bonding equipment. Asia will continue to be the largest installation region, while North America, Europe, and Japan will generate high-end demand from localized AI packaging, automotive electronics, defense and aerospace, and advanced packaging development lines.

Market opportunities are mainly driven by the migration of high-end packages from traditional single-die formats toward multi-die, high-bandwidth, low-power, and short-interconnect architectures, where the package substrate becomes a critical performance platform rather than a passive carrier. At the same time, the industry faces challenges such as high equipment investment, long customer qualification cycles, narrow process windows, sensitivity to package-substrate warpage, and strong dependence on materials and process recipes. As C2S thermo-compression bonding evolves alongside hybrid bonding and chip-to-wafer bonding, Chip-to-Package-Substrate Bonders will not replace all interconnect technologies, but they are expected to maintain steady growth in AI and HPC, advanced logic, HBM-related substrate-level integration, and high-end flip-chip packaging. Equipment suppliers with proven high-volume manufacturing experience, packaging-process know-how, and high-precision automation platforms will gain stronger pricing power in future procurement cycles.

This report is a detailed and comprehensive analysis for global Package-Substrate C2S Bonder 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 Package-Substrate C2S Bonder market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Package-Substrate C2S Bonder market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Package-Substrate C2S Bonder 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 Package-Substrate C2S Bonder 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 Package-Substrate C2S Bonder

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 Package-Substrate C2S Bonder 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

Package-Substrate C2S Bonder 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 Package Substrate Size

Large Package Substrate

Medium Package Substrate

Small Package Substrate

Market segment by Bonding Technology

Thermo Compression Bonding

Flip Chip Mass Reflow Bonding

Other Package Substrate Bonding

Market segment by Application

Advanced Logic and Chiplet Packaging

High Bandwidth Memory Related Packaging

High End Flip Chip Packaging

Other Advanced Package Substrate 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 Package-Substrate C2S Bonder product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Package-Substrate C2S Bonder, with price, sales quantity, revenue, and global market share of Package-Substrate C2S Bonder from 2021 to 2026.

Chapter 3, the Package-Substrate C2S Bonder competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Package-Substrate C2S Bonder 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 Package-Substrate C2S Bonder 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

Package-Substrate C2S Bonder.

Chapter 14 and 15, to describe Package-Substrate C2S Bonder sales channel, distributors, customers, research findings and conclusion.

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