

Global Photonic Chip KGD Test and Sorting Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Photonic Chip KGD Test and Sorting Systems market size is expected to reach \$ 1196 million by 2032, rising at a market growth of 21.3% CAGR during the forecast period (2026-2032).

Photonic Chip KGD Test and Sorting Systems are automated equipment platforms used to test, classify and screen photonic, optoelectronic and silicon photonics devices at wafer level, bar level, singulated-die level or before advanced packaging. These systems typically integrate wafer or die handling, probe stations, optical coupling and nano-positioning modules, electrical/RF test instruments, LIV, spectrum, near-field and far-field measurement modules, thermal control, software automation, die mapping, binning and data traceability. The core purpose is to identify Known Good Die before costly photonic packaging, co-packaged optics assembly, optical module manufacturing, or heterogeneous integration, thereby improving final yield and reducing downstream scrap cost.

Based on our research, the market for Photonic Chip KGD Test and Sorting Systems should be understood as a specialized equipment segment rather than a generic semiconductor tester or optical-module test market. The core system combines optical coupling, electrical and RF testing, high-precision motion control, wafer or die automation, temperature control, binning software and traceability. Unlike conventional IC wafer sort, photonic devices require optical-to-optical, optical-to-electrical, electrical-to-optical and electrical-to-electrical measurements at wafer or die level. This creates difficult requirements around edge coupling, grating coupling, fiber-array alignment, optical loss stability, LIV, near-field and far-field measurements, and automated calibration. Therefore, the most appropriate market boundary is chip-level KGD screening and sorting before photonic packaging, advanced packaging or optical-engine

assembly.

Demand growth is driven by three major forces. First, AI data centers, co-packaged optics, near-package optics and optical I/O are pushing silicon photonics closer to manufacturing scale, making wafer-level electro-optical test a bottleneck for yield ramp. Second, VCSEL and laser-diode applications in datacom, 3D sensing, LiDAR and optical sensing continue to require high-throughput wafer testing and binning. Third, advanced packaging increases the value of KGD screening, because a defective photonic die integrated into a high-value package can cause disproportionate downstream scrap cost. This makes the segment structurally attractive, although the pace of adoption will depend on CPO deployment, silicon photonics wafer capacity and the willingness of large customers to buy external systems rather than build internal test platforms.

From a technology perspective, the next stage of competition will move beyond basic measurement capability toward throughput, repeatability, automated alignment, multi-channel scaling, factory integration and data traceability. Silicon photonics test systems are moving toward 300mm wafer compatibility, edge and grating coupling support, RF/DC/optical co-test, automated probe and fiber calibration, and SECS/GEM-ready production cells. VCSEL and laser-diode test systems are moving toward higher pulsed current, shorter pulse width, wider temperature range and combined LIV, spectrum, near-field and far-field characterization. Regional supply-chain localization will create opportunities for Chinese and Asian vendors, but the leading production platforms will still be defined by customer qualification history, uptime, alignment stability and installed-base learning.

This report studies the global Photonic Chip KGD Test and Sorting Systems demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photonic Chip KGD Test and Sorting Systems, 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 Photonic Chip KGD Test and Sorting Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Photonic Chip KGD Test and Sorting Systems total market, 2021-2032, (USD Million)

Global Photonic Chip KGD Test and Sorting Systems total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Photonic Chip KGD Test and Sorting Systems total market, key domestic companies, and share, (USD Million)

Global Photonic Chip KGD Test and Sorting Systems revenue by player, revenue and market share 2021-2026, (USD Million)

Global Photonic Chip KGD Test and Sorting Systems total market by Type, CAGR, 2021-2032, (USD Million)

Global Photonic Chip KGD Test and Sorting Systems total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Photonic Chip KGD Test and Sorting Systems market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include FormFactor, Inc., Teradyne, Inc., Advantest Corporation, Tokyo Electron Limited, Keysight Technologies, Inc., RoboTechnik Intelligent Technology Co., Ltd., MPI Corporation, Chroma ATE Inc., Konica Minolta, Inc., SPEA S.p.A., 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 Photonic Chip KGD Test and Sorting Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Photonic Chip KGD Test and Sorting Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photonic Chip KGD Test and Sorting Systems Market, Segmentation by Type:

Wafer-level Test System

Die-level KGD Test System

Other Customized System

Global Photonic Chip KGD Test and Sorting Systems Market, Segmentation by Optical Coupling Method:

Grating Coupling

Edge Coupling

Free-space Coupling

Hybrid Coupling

Other

Global Photonic Chip KGD Test and Sorting Systems Market, Segmentation by Test Function:

Optical Test

Electrical Test

RF / High-speed Test

Thermal Test

Other

Global Photonic Chip KGD Test and Sorting Systems Market, Segmentation by Automation Level:

Manual Test System

Semi-automatic Test System

Fully Automatic Test System

Global Photonic Chip KGD Test and Sorting Systems Market, Segmentation by Application:

Optical Communications

Data Center & AI Computing

Advanced Semiconductor Packaging

Consumer Electronics

Medical & Biophotonics

R&D and Engineering Validation

Defense & Aerospace Optoelectronics

Companies Profiled:

FormFactor, Inc.

Teradyne, Inc.

Advantest Corporation

Tokyo Electron Limited

Keysight Technologies, Inc.

RoboTechnik Intelligent Technology Co., Ltd.

MPI Corporation

Chroma ATE Inc.

Konica Minolta, Inc.

SPEA S.p.A.

Aehr Test Systems

EXFO Inc.

Pentamaster Corporation Berhad

FitTech Co., Ltd.

Enlitech Co., Ltd.

SEMISHARE

Semight Instruments Co., Ltd.

Alphax Co., Ltd.

Yuasa Electronics Co., Ltd.

Wuhan Precise Electronics Co., Ltd.

Hebei THAHOO Optoelectronics Technology Co., Ltd.

SemiProbe, Inc.

Opto System Co., Ltd.

Synos Technology, Inc.

Key Questions Answered

1. How big is the global Photonic Chip KGD Test and Sorting Systems market?
2. What is the demand of the global Photonic Chip KGD Test and Sorting Systems market?
3. What is the year over year growth of the global Photonic Chip KGD Test and Sorting Systems market?
4. What is the total value of the global Photonic Chip KGD Test and Sorting Systems market?
5. Who are the Major Players in the global Photonic Chip KGD Test and Sorting Systems market?
6. What are the growth factors driving the market demand?

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