

Global Photonics Die Bonding Equipment 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 Photonics Die Bonding Equipment market size was valued at US\$ 144 million in 2025 and is forecast to a readjusted size of US\$ 337 million by 2032 with a CAGR of 12.7% during review period.

Photonics Die Bonding Equipment refers to specialized packaging equipment used to accurately place and bond silicon photonics chips, III-V laser dies, modulators, detectors, photonic integrated circuits, micro-optical elements, or heterogeneous photonic integration chips onto photonic integrated circuits, silicon platforms, interposers, wafers, carriers, or co-packaged optics modules. These systems typically integrate a sub-micron motion platform, top-and-bottom vision or infrared vision, die pick-and-flip handling, active or passive optical alignment, eutectic bonding, thermocompression bonding, laser welding, epoxy curing, bond-force control, and process-control software. Key evaluation metrics include placement accuracy, optical coupling efficiency, angular error, thermal drift, low-stress bonding, and production repeatability. Major production regions include Germany, the United States, Singapore, Sweden, France, Japan, and China, while typical applications include silicon photonics transceiver chips, CPO optical engines, on-chip laser integration, photonic sensing, quantum photonic devices, high-speed optical interconnects, and advanced photonic packaging R&D and mass production.

In 2025, global production of photonics die bonding equipment reached approximately 85-105 units, with mainstream FOB prices of about 1.10-2.20 million USD per unit. Lower-end configurations were mainly used in universities, research institutes, silicon photonics pilot lines, and small-batch heterogeneous integration validation, while high-end configurations typically featured sub-micron placement, active optical alignment,

wafer-level handling, eutectic bonding, thermocompression bonding, laser welding, or automated loading capabilities, serving silicon photonics, photonic integrated circuits, co-packaged optics, optical engines, high-speed optical interconnects, and high-reliability photonic integration packaging.

The global Photonics Die Bonding Equipment market is shifting from an R&D-oriented equipment segment to a high-value production equipment segment. AI data centers, 800G and 1.6T optical interconnects, silicon photonics, co-packaged optics, photonic integrated circuits, and heterogeneous integration are redefining the boundaries of advanced packaging. Photonics die bonding equipment is therefore evolving from a high-precision placement tool into a critical manufacturing platform that integrates optical alignment, bonding, inspection, and process control. Compared with conventional die placement, photonics die bonding must ensure not only chip placement accuracy, but also optical coupling efficiency, mode matching, thermal stability, and long-term reliability. As a result, equipment prices, process barriers, and customer qualification cycles are significantly higher. As cloud service providers, switch-chip suppliers, optical module manufacturers, silicon photonics foundry platforms, and specialized photonic packaging service providers accelerate investment, systems with high precision, high stability, multi-process compatibility, and automation scalability will become a major focus of capital spending.

The main challenges come from incomplete process standardization, strong customer customization, difficult yield ramp-up, and concentrated supply of critical motion-control and optical-alignment modules. Different photonic chips vary substantially in material system, coupling structure, solder system, coefficient of thermal expansion, and package architecture, which requires equipment suppliers to provide strong application engineering capabilities rather than standardized hardware alone. Future demand will continue to be driven by high-bandwidth, low-power, and high-density optical interconnects, while the mass production of CPO and silicon photonics will push equipment from semi-automatic and pilot-line platforms toward fully automated, high-throughput, high-yield systems. Competitive differentiation will move from placement accuracy alone to a combined contest of accuracy, speed, optical coupling efficiency, process databases, automated inspection, and full-line integration capability.

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

Global Photonics Die Bonding Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Photonics Die Bonding Equipment 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 Photonics Die Bonding Equipment 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 Photonics Die Bonding Equipment

- 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 Photonics Die Bonding Equipment 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 Mycronic AB, ASMPT Ltd., ficonTEC Service GmbH, Palomar Technologies, Inc., Finetech GmbH & Co. KG, SET Corporation, TRESKY GmbH, BE Semiconductor Industries N.V., EV Group, Shibuya Corporation, etc.

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

Market Segmentation

Photonics Die Bonding Equipment 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 Photonic Integrated Circuit Bonders

- Chip to Wafer Bonders

- Chip to Interposer Bonders

- Others

Market segment by Alignment Method

- Active Optical Alignment

- Passive Vision Alignment

- Hybrid Passive and Active Alignment

Market segment by Bonding Process

- Eutectic Solder Bonding

- Thermocompression Bonding

- Epoxy and UV Curing

Others

Market segment by Package Architecture

Heterogeneous Photonic Integration Packages

Co Packaged Optics Packages

Silicon Photonics Transceiver Packages

Others

Market segment by Application

Silicon Photonics Devices

Co Packaged Optics Devices

Photonic Integrated Circuit Devices

Others

Major players covered

Mycronic AB

ASMPT Ltd.

ficonTEC Service GmbH

Palomar Technologies, Inc.

Finetech GmbH & Co. KG

SET Corporation

TRESKY GmbH

BE Semiconductor Industries N.V.

EV Group

Shibuya Corporation

Toray Engineering Co., Ltd.

Hanwha Semitech Co., Ltd.

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

Bozhon Precision Industry Technology Co., Ltd.

SHENZHEN AIT PRECISION TECHNOLOGY CO., LTD.

Suzhou Lieqi Intelligent Equipment Co., Ltd.

Dongguan Precision Intelligent Technology Co., Ltd.

DongGuan Attach Point Intelligent Equipment Co., Ltd.

Your-Chance Technology 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 Photonics Die Bonding Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Photonics Die Bonding Equipment, with price, sales quantity, revenue, and global market share of Photonics Die Bonding Equipment from 2021 to 2026.

Chapter 3, the Photonics Die Bonding Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Photonics Die Bonding Equipment 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 Photonics Die Bonding Equipment 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 Photonics Die Bonding Equipment.

Chapter 14 and 15, to describe Photonics Die Bonding Equipment sales channel, distributors, customers, research findings and conclusion.

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