

Global Photonics Die Bonding Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Photonics Die Bonding Equipment market size is expected to reach \$ 337 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

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 studies the global Photonics Die Bonding Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Photonics Die Bonding 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 Photonics Die Bonding Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Photonics Die Bonding Equipment total production and demand, 2021-2032, (Units)

Global Photonics Die Bonding Equipment total production value, 2021-2032, (USD Million)

Global Photonics Die Bonding Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Photonics Die Bonding Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Photonics Die Bonding Equipment domestic production, consumption, key domestic manufacturers and share

Global Photonics Die Bonding Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Photonics Die Bonding Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Photonics Die Bonding Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Photonics Die Bonding 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Photonics Die Bonding Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) 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 Photonics Die Bonding Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photonics Die Bonding Equipment Market, Segmentation by Type:

Chip to Photonic Integrated Circuit Bonders

Chip to Wafer Bonders

Chip to Interposer Bonders

Others

Global Photonics Die Bonding Equipment Market, Segmentation by Alignment Method:

Active Optical Alignment

Passive Vision Alignment

Hybrid Passive and Active Alignment

Global Photonics Die Bonding Equipment Market, Segmentation by Bonding Process:

Eutectic Solder Bonding

Thermocompression Bonding

Epoxy and UV Curing

Others

Global Photonics Die Bonding Equipment Market, Segmentation by Package Architecture:

Heterogeneous Photonic Integration Packages

Co Packaged Optics Packages

Silicon Photonics Transceiver Packages

Others

Global Photonics Die Bonding Equipment Market, Segmentation by Application:

Silicon Photonics Devices

Co Packaged Optics Devices

Photonic Integrated Circuit Devices

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Photonics Die Bonding Equipment market?
2. What is the demand of the global Photonics Die Bonding Equipment market?
3. What is the year over year growth of the global Photonics Die Bonding Equipment market?
4. What is the production and production value of the global Photonics Die Bonding Equipment market?
5. Who are the key producers in the global Photonics Die Bonding Equipment market?
6. What are the growth factors driving the market demand?

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