

Global Photonics and Optoelectronic 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 and Optoelectronic Die Bonding Equipment market size was valued at US\$ 350 million in 2025 and is forecast to a readjusted size of US\$ 684 million by 2032 with a CAGR of 9.8% during review period.

Photonics and optoelectronic die bonding equipment refers to specialized semiconductor packaging equipment used to accurately place and bond laser dies, VCSELs, photodiodes, modulators, silicon photonics chips, III-V dies, lenses, micro-optical elements, and related optoelectronic chips onto submounts, substrates, photonic integrated circuits, wafers, ceramic carriers, or optical module packages. These systems typically integrate a high-rigidity motion platform, vision alignment, die pick-and-flip handling, thermocompression or eutectic bonding modules, dispensing or stamping modules, active or passive optical alignment, bond-force control, heating stages, and process-control software. Key performance indicators include sub-micron to micron-level placement accuracy, angular control, low-stress bonding, thermal stability, and compatibility with multiple die sizes and substrate formats. Major production regions include Germany, the United States, Singapore, Switzerland, Japan, and China, while typical applications include high-speed optical modules, silicon photonics packaging, co-packaged optics, LiDAR, optical communication devices, sensors, medical photonics, and high-power laser components.

In 2025, global production of photonics and optoelectronic die bonding equipment reached approximately 315-375 units, with mainstream FOB prices of about 0.55-1.65 million USD per unit. Lower-end configurations were mainly used for R&D, pilot production, and small-to-medium-volume optoelectronic packaging, while high-end

configurations typically integrated sub-micron placement, active optical alignment, eutectic bonding, thermocompression bonding, laser welding, 12-inch wafer handling, or automated loading capabilities, serving high-value applications such as silicon photonics, co-packaged optics, high-speed optical modules, laser diodes, VCSELs, photodetectors, and LiDAR.

The global photonics and optoelectronic die bonding equipment market is entering a critical transition from R&D adoption to scalable manufacturing. AI data centers, 800G and 1.6T optical modules, silicon photonics, co-packaged optics, VCSEL arrays, automotive LiDAR, and high-power laser devices are driving optoelectronic packaging toward higher precision, higher throughput, and greater automation. Compared with conventional electronic packaging, photonics die bonding must control not only chip placement, but also optical coupling efficiency, angular error, thermal drift, bonding stress, and long-term reliability. As a result, equipment value is significantly higher than that of standard die attach tools. As optical module manufacturers, silicon photonics foundries, IDMs, OSATs, and specialized photonic packaging service providers expand pilot and production lines, equipment with active alignment, sub-micron placement, multi-process bonding, and highly stable motion platforms will become a key focus of capital expenditure.

The main challenges are high customization, process diversity, long qualification cycles, and concentrated supply chains. Photonic device packaging still involves multiple parallel technology routes, and customers differ substantially in chip materials, substrate architecture, coupling design, adhesives, solders, and testing methods. Equipment suppliers therefore need strong process-application capabilities and long-term field-support resources. At the same time, downstream demand remains structurally positive: AI computing clusters are increasing demand for high-speed optical interconnects, silicon photonics and co-packaged optics are expanding wafer-level and chip-level precision bonding requirements, and automotive and industrial sensing applications are supporting VCSEL, detector, and LiDAR component demand. Future competition will shift from placement accuracy alone toward an integrated contest of accuracy, speed, yield, process compatibility, and automation capability.

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

Global Photonics and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic 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 Submount Die Bonders

- Chip to Photonic Integrated Circuit Bonders

- Optical Align and Attach Bonders

- Others

Market segment by Alignment Method

- Passive Vision Alignment

- Active Optical Alignment

- Hybrid Passive and Active Alignment

Market segment by Bonding Process

- Epoxy and UV Curing

- Eutectic Solder Bonding

Thermocompression Bonding

Others

Market segment by Placement Accuracy

Sub Micron Accuracy

One to Two Micron Accuracy

Above Two Micron Accuracy

Market segment by Application

Data Communications and Telecom

Automotive Sensing

Consumer Optoelectronics

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 and Optoelectronic Die Bonding Equipment product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Photonics and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic Die Bonding Equipment.

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

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