

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

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Abstracts

The global Photonics and Optoelectronic Die Bonding Equipment market size is expected to reach \$ 684 million by 2032, rising at a market growth of 9.8% CAGR during the forecast period (2026-2032).

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

This report is a detailed and comprehensive analysis of the world market for Photonics and Optoelectronic 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 and

Optoelectronic Die Bonding Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Photonics and Optoelectronic 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 and Optoelectronic 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 and Optoelectronic Die Bonding Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Photonics and Optoelectronic Die Bonding Equipment Market, Segmentation by Type:

Chip to Submount Die Bonders

Chip to Photonic Integrated Circuit Bonders

Optical Align and Attach Bonders

Others

Global Photonics and Optoelectronic Die Bonding Equipment Market, Segmentation by

Alignment Method:

Passive Vision Alignment

Active Optical Alignment

Hybrid Passive and Active Alignment

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

Epoxy and UV Curing

Eutectic Solder Bonding

Thermocompression Bonding

Others

Global Photonics and Optoelectronic Die Bonding Equipment Market, Segmentation by Placement Accuracy:

Sub Micron Accuracy

One to Two Micron Accuracy

Above Two Micron Accuracy

Global Photonics and Optoelectronic Die Bonding Equipment Market, Segmentation by Application:

Data Communications and Telecom

Automotive Sensing

Consumer Optoelectronics

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

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