

Global Wafer-Level Silicon Photonics Test System Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Wafer-Level Silicon Photonics Test System market size was valued at US\$ 252 million in 2025 and is forecast to a readjusted size of US\$ 1114 million by 2032 with a CAGR of 21.3% during review period.

A Wafer-Level Silicon Photonics Test System is a dedicated wafer-level electro-optical test platform used to characterize, screen, and qualify silicon photonics devices, photonic integrated circuits, and related optoelectronic integrated chips before packaging. The scope of this study focuses on integrated test systems deployed at wafer, reticle, bar, or bare-die stages. A typical system combines a semi-automatic or fully automatic wafer prober, optical fiber or fiber-array coupling hardware, six-axis precision positioning and active optical alignment, electrical and RF probing, tunable lasers, optical power meters, polarization control, source-measure units, high-speed electrical instruments, temperature-controlled chucks, light-tight enclosures, machine vision, calibration algorithms, test automation software, data management, and factory automation interfaces. Its core functions include optical coupling, optical-electrical and electrical-optical measurement, passive photonic spectral characterization, active device LIV / EO / OE testing, RF and high-speed validation, process control monitoring, known-good-die identification, yield feedback, and production screening for silicon photonics foundries, IDMs, optical module makers, co-packaged optics suppliers, AI data-center optical interconnect manufacturers, and integrated photonics R&D platforms.

Based on our research, the wafer-level silicon photonics test system market should not be viewed as a simple extension of conventional electronic wafer probing. It is a cross-

domain equipment segment that combines semiconductor test automation, precision optical coupling, electro-optical and RF measurement, active alignment, thermal control, calibration algorithms, and production data infrastructure. Conventional IC wafer test mainly focuses on electrical contact, pin count, parallelism, and parametric screening, while silicon photonics wafer test must also solve fiber-to-waveguide coupling, grating or edge-coupler alignment, polarization control, optical power stability, insertion loss repeatability, reflection effects, temperature drift, and high-speed optical-electrical correlation. For this reason, this study adopts a narrow revenue scope. General-purpose optical instruments, generic probers, packaged optical module testers, and testing services are not treated as core revenue unless they are delivered as part of a wafer-level silicon photonics test system. The broader supplier pool, however, still includes critical component suppliers and system integrators because the industry remains ecosystem-driven and project-based.

Demand is shifting from research labs and MPW characterization toward pilot production and early high-volume manufacturing. Before 2025, most demand came from silicon photonics foundries, IDMs, academic platforms, optical module companies, and early CPO programs. Starting in 2025-2026, AI data centers, 800G/1.6T optical interconnects, co-packaged optics, near-package optics, optical I/O, and hybrid-bonded PIC/EIC architectures are increasing the need for wafer-level screening. The economic driver is straightforward: once a photonic die is diced, assembled, fiber-attached, or co-packaged with electronic ICs, the cost of failure rises sharply. Wafer-level electro-optical screening therefore becomes a critical enabler of known-good-die selection, yield learning, process control, and cost reduction.

From a technology-roadmap perspective, three product families are likely to coexist. The first is flexible R&D and pilot-production PIC wafer or die test stations, which emphasize multi-device compatibility, rapid configuration, and support for both surface and edge coupling. The second is 200 mm and 300 mm automated wafer-level test systems for foundries and IDMs, which emphasize throughput, repeatability, thermal stability, factory automation, and traceable data. The third is high-volume double-sided electro-optical test cells and wafer-level burn-in or reliability systems for CPO, optical engines, and optical I/O devices. Edge coupling, grating coupling, wafer-level edge coupling, double-sided probing, fiber-array parallelism, RF-optical co-test, and automated calibration will become the key differentiators. The industry will remain customized in the near term, but the direction is clearly toward modularity, software-defined workflows, and open ecosystems that reduce integration burden for production customers.

From the competitive trend perspective, the silicon photonics wafer test system market is expected to move from customized engineering setups toward more standardized, production-ready test cells. In the early stage, many systems were assembled through a combination of a wafer prober, optical instruments, precision alignment stages, and customer-specific software. As silicon photonics, CPO, and optical I/O move closer to high-volume manufacturing, customers will increasingly require integrated platforms with higher throughput, better repeatability, automated optical alignment, double-sided probing capability, factory automation interfaces, and traceable production data. This transition favors vendors that can combine semiconductor ATE experience, photonics alignment expertise, optical-electrical measurement capability, and global service support. At the same time, regional suppliers, especially in China and Taiwan, are likely to gain share in engineering systems, pilot lines, and localized production support. Over the next few years, competition will not be determined only by instrument accuracy or prober performance, but by the ability to deliver a stable, scalable, and software-driven wafer-level test workflow. The market is therefore likely to evolve into a layered structure: a small group of global platform suppliers serving advanced HVM customers, several specialized photonics automation and probe-system vendors serving both R&D and production customers, and a broader group of regional integrators and component suppliers supporting localized applications.

This report is a detailed and comprehensive analysis for global Wafer-Level Silicon Photonics Test System market. Both quantitative and qualitative analyses are presented by company, 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 Wafer-Level Silicon Photonics Test System market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Wafer-Level Silicon Photonics Test System market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Wafer-Level Silicon Photonics Test System market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Wafer-Level Silicon Photonics Test System market shares of main players, in revenue (\$ Million), 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 Wafer-Level Silicon Photonics Test System

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 Wafer-Level Silicon Photonics Test System 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 Keysight Technologies, Inc., Teradyne, Inc., FormFactor, Inc., Advantest Corporation, Tokyo Electron Limited, MPI Corporation, RoboTechnik Intelligent Technology Co., Ltd., EXFO Inc., Semight Instruments Co., Ltd., SEMISHARE CO., LTD., etc.

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

Market segmentation

Wafer-Level Silicon Photonics Test System 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. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Integrated Wafer Test System

Other

Market segment by Wafer / Device Format

6-inch and Below Wafer Test

8-inch Wafer Test

12-inch Wafer Test

Other

Market segment by Automation Level

Manual Test System

Semi-Automated Test System

Fully Automated Wafer Test System

Market segment by Measurement Configuration

Optical-Only Configuration

Electrical-Only Configuration

Optical-to-Electrical Configuration

Electrical-to-Optical Configuration

Other

Market segment by Application

R&D Characterization

Process Monitoring

Production Screening

Failure Analysis Support

Other

Market segment by players, this report covers

Keysight Technologies, Inc.

Teradyne, Inc.

FormFactor, Inc.

Advantest Corporation

Tokyo Electron Limited

MPI Corporation

RoboTechnik Intelligent Technology Co., Ltd.

EXFO Inc.

Semight Instruments Co., Ltd.

SEMISHARE CO., LTD.

STAr Technologies, Inc.

FIBERPRO, Inc.

SPEA S.p.A.

Aehr Test Systems

Enlitech

Yonata Electronics Co., Ltd.

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Wafer-Level Silicon Photonics Test System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Wafer-Level Silicon Photonics Test System, with revenue, gross margin, and global market share of Wafer-Level Silicon Photonics Test System from 2021 to 2026.

Chapter 3, the Wafer-Level Silicon Photonics Test System competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Wafer-Level Silicon Photonics Test System market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces

analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Wafer-Level Silicon Photonics Test System.

Chapter 13, to describe Wafer-Level Silicon Photonics Test System research findings and conclusion.

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