

Global Chip-to-Substrate Bonding Equipment Market Growth 2026-2032

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Abstracts

The global Chip-to-Substrate Bonding Equipment market size is predicted to grow from US\$ 558 million in 2025 to US\$ 979 million in 2032; it is expected to grow at a CAGR of 8.3% from 2026 to 2032.

Chip-to-Substrate Bonding Equipment refers to advanced packaging equipment used to accurately place and bond bare dies, chiplets, optoelectronic chips, MEMS devices, or power semiconductor dies onto package substrates, ceramic substrates, silicon interposers, carriers, or submounts. Its core functions include die picking, flipping, optical alignment, substrate positioning, bonding-force control, thermal, laser, ultrasonic, or thermo-compression process control, flux or solder handling, post-bond inspection, and process traceability. These systems are typically supplied as fully automatic or semi-automatic platforms, with key specifications including placement accuracy, bonding force, thermal uniformity, cycle time, supported die size, substrate size, and compatibility with multi-die processes. Major applications include flip-chip packaging, 2.5D/3D advanced packaging, AI and HPC chips, HBM-related packaging, silicon photonics, optical communication modules, automotive-grade power devices, and high-reliability industrial or defense electronics. Major supply bases are concentrated in Singapore/Hong Kong-linked ecosystems, the Netherlands, Switzerland, the United States, Germany, France, and Japan, while mainland Chinese suppliers are accelerating entry into mid- to high-precision segments under advanced packaging localization demand.

In 2025, global production of Chip-to-Substrate Bonding Equipment reached approximately 280-340 units, with mainstream fully automatic production tools priced at an average FOB range of USD 1.4-2.6 million per unit. High-precision C2S thermo-compression bonding systems, flip-chip bonders, and large-format multi-die bonding

platforms for AI and HPC advanced packaging were priced significantly above conventional epoxy or soft-solder die attach systems, mainly due to higher requirements for placement accuracy, bonding-force control, thermal control, substrate handling, automatic loading, in-line inspection, and process traceability.

As AI accelerators, HPC processors, HBM, chiplets, multi-die modules, and high-bandwidth interconnect packages move into capacity expansion, Chip-to-Substrate Bonding Equipment is evolving from a conventional back-end assembly tool into a critical process platform for advanced packaging. These systems directly affect alignment accuracy, interconnect reliability, thermo-mechanical stability, and yield consistency between bare dies and package substrates, making them especially important for large high-value dies, heterogeneous multi-chip integration, and fine-pitch flip-chip interconnects. Over the next several years, demand will be driven mainly by advanced packaging foundries, leading OSATs, IDMs, memory manufacturers, silicon photonics module makers, and power semiconductor suppliers. Asia will remain the largest demand region, while North America, Europe, and Japan will focus more on high-end process development, automotive electronics, defense and aerospace, silicon photonics, and localized advanced packaging capacity.

The main market challenges include high equipment prices, long customer qualification cycles, deep customization for leading customers, and process complexity caused by different die sizes, substrate materials, warpage behavior, thermal-compression windows, and flux-residue control. For equipment suppliers, competition is shifting from placement speed alone toward integrated capabilities in accuracy, force control, thermal control, cleanliness, in-line inspection, data traceability, and line-level integration. As package interconnects migrate from conventional bumps toward fine-pitch copper pillars, micro-bumps, fluxless thermo-compression, and higher-density interconnect structures, suppliers with proven C2S TCB, multi-die placement, large-substrate handling, and high-yield production experience are expected to gain stronger pricing power, while lower-end general-purpose die attach equipment suppliers will face pressure to move up the technology curve.

LP Information, Inc. (LPI) ' newest research report, the "Chip-to-Substrate Bonding Equipment Industry Forecast" looks at past sales and reviews total world Chip-to-Substrate Bonding Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Chip-to-Substrate Bonding Equipment sales for 2026 through 2032. With Chip-to-Substrate Bonding Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Chip-to-Substrate Bonding Equipment industry.

This Insight Report provides a comprehensive analysis of the global Chip-to-Substrate Bonding Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Chip-to-Substrate Bonding Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chip-to-Substrate Bonding Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chip-to-Substrate Bonding Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Chip-to-Substrate Bonding Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Chip-to-Substrate Bonding Equipment market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Chip to Organic Package Substrate Bonder

Chip to Ceramic Substrate Bonder

Chip to Silicon Interposer Bonder

Chip to Submount or Carrier Bonder

Segmentation by Placement Accuracy:

Ultra High Precision below Two Micrometers

High Precision from Two to Five Micrometers

Standard Precision above Five Micrometers

Segmentation by Equipment Form:

Fully Automatic Production Bonder

Semi Automatic Production Bonder

Laboratory and Process Development Bonder

Segmentation by Bonding Technology:

Thermo Compression Bonding

Flip Chip Mass Reflow Bonding

Eutectic and Soft Solder Bonding

Epoxy Die Attach Bonding

Segmentation by Application:

Advanced Logic and Chiplet Packaging

High Bandwidth Memory Related Packaging

Optoelectronic and Silicon Photonics Packaging

Power and Automotive Device Packaging

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ASMPT Ltd

BE Semiconductor Industries N.V.

Kulicke & Soffa Industries, Inc.

Shibaura Mechatronics Corporation

Toray Engineering Co., Ltd.

Panasonic Connect Co., Ltd.

Yamaha Robotics Co., Ltd.

Canon Machinery Inc.

Shibuya Corporation

HANMI Semiconductor Co., Ltd.

Hanwha Semitech Co., Ltd.

Mycronic AB

SET Corporation

Finetech GmbH & Co. KG

PacTech - Packaging Technologies GmbH

Dr. Tresky AG

ITEC B.V.

Palomar Technologies, Inc.

Capcon Limited Co., Ltd.

All Ring Tech Co., Ltd.

Shenzhen Xinyichang Technology Co., Ltd.

Shenzhen S-King Intelligent Equipment Co., Ltd.

Quick Intelligent Equipment Co., Ltd.

Shenzhen Liande Automation Equipment Co., Ltd.

DongGuan Attach Point Intelligent Equipment Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Chip-to-Substrate Bonding Equipment market?

What factors are driving Chip-to-Substrate Bonding Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Chip-to-Substrate Bonding Equipment market opportunities vary by end market size?

How does Chip-to-Substrate Bonding Equipment break out by Type, by Application?

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