

# Global CoS Die-Bonder Market Growth 2026-2032

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## Abstracts

The global CoS Die-Bonder market size is predicted to grow from US\$ 115 million in 2025 to US\$ 273 million in 2032; it is expected to grow at a CAGR of 13.2% from 2026 to 2032.

A CoS die bonder is a high-precision back-end core tool used in advanced packaging and high-end optoelectronic packaging. Its main function is to pick bare dies from wafers or incoming carriers and then place and bond them onto package substrates, interposers, wafers, carriers, or photonic device holders through vision recognition, positional compensation, flipping, heating, force control, ultrasonic bonding, or thermocompression processes, thereby solving problems such as fine-pitch interconnection, multi-die integration, thin-die handling, low thermal damage, production consistency, and in-line quality monitoring. Mainstream equipment has evolved from traditional single-function die attach platforms into compound platforms that can cover CoS, CoW, CoC, Flip Chip, TCB, multi-chip integration, and photonic chip hybrid integration. These systems serve FCBGA, FCCSP, SiP, MCM, Chiplet, HBM, 2.5D and 3D packaging, while also extending into silicon photonics, co-packaged optics, optical modules, lasers, sensors, and high-end power devices. Their core competitiveness is concentrated in sub-micron to several-micron placement accuracy, broad process compatibility, closed-loop force and temperature control, clean process environments, automatic recipe changeover, and process data visualization. In commercial delivery, suppliers typically provide the machine itself, tooling and software modules, process validation, production ramp support, and global service, forming a continuous solution path from R&D prototyping to high-volume manufacturing.

The industrial upgrading of CoS die bonders is essentially the result of advanced packaging shifting from a single die attach action toward a high-precision heterogeneous integration platform. As FCBGA, FCCSP, SiP, MCM, Chiplet, HBM, 2.5D, and 3D packaging continue to move toward finer pitch, higher I O density, and

stronger thermal reliability, the equipment is no longer required merely to transfer and place dies. Instead, it must simultaneously deliver vision alignment, motion control, closed-loop force and temperature control, material compatibility, and process monitoring within extremely short cycle times. Panasonic's MD-P300HS already combines low-temperature ultrasonic bonding, high accuracy, and real-time quality monitoring, while Yamaha's NeoForce series packages TCB, chip-to-substrate capability, and high bonding force into a standardized platform for next-generation packaging. Besi's 9800 TC next goes even further by explicitly defining chiplet and interposer applications in the product concept. This indicates that the competitive logic of CoS die bonders has shifted from single-point accuracy competition toward platform capability, multi-process coverage, and high-yield production performance.

From a competitive landscape perspective, the sector still shows a structure led by Europe and Japan, with South Korea and China accelerating their catch-up. European suppliers are strongest in ultra-high precision, multi-chip assembly, advanced thermocompression, and high-end optoelectronic packaging. ASMPT AMICRA represents sub-micron placement capability and advanced heterogeneous integration, Besi has a complete layout across multi-chip, flip chip, TCB, and high-force platforms, and Finetech and ficonTEC have each built differentiation in high-precision development-to-production migration and automated photonic assembly. Japanese companies stand out for multi-process know-how and engineering execution. Toray, Panasonic, Yamaha, and FOUR TECHNOS each have deep experience across CoS, CoW, TCB, optical communication modules, and multiple bonding routes. At the same time, Hanwha is already supplying equipment to global IDM and OSAT customers, while Guangzhou Nuoding has formed a more complete domestic product line in advanced packaging and flip-chip die bonding. This shows that regional competition is evolving from import substitution toward selective breakthroughs in higher-end segments.

Over the next few years, the most important growth drivers in this market will come from rising packaging complexity driven by advanced computing and high-speed interconnects, as well as the continued expansion of equipment requirements under electro-optical convergence. On one side, Chiplet, HBM, CPO, and silicon photonics are making higher accuracy, higher bonding force, lower thermal damage, and stronger process traceability into new baseline requirements, forcing equipment suppliers to strengthen thermal management, force control, clean process environments, and process data interfaces for production ramp. On the other side, customers increasingly want the same platform to cover R&D prototyping, NPI validation, and large-scale manufacturing, in order to compress process migration time and avoid inefficient capital spending. Finetech's modular platform, ficonTEC's Lab-to-Fab pathway, Mycronic's

high-precision die bonding for photonics and co-packaging, and the expansion of Chinese suppliers into pre-sintering, flip chip, and multi-scenario integration all indicate that CoS die bonders are not a slowing single-function equipment segment. Instead, they remain an equipment track whose ceiling is still being raised by advanced packaging and optical communications.

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

This Insight Report provides a comprehensive analysis of the global CoS Die-Bonder 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 CoS Die-Bonder portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global CoS Die-Bonder market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for CoS Die-Bonder 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 CoS Die-Bonder.

This report presents a comprehensive overview, market shares, and growth opportunities of CoS Die-Bonder market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fully Automatic

Semi Automatic

### Segmentation by Placement Accuracy Class:

Sub-Micron Class

High-Precision Class (1?3 ?m)

Mid-High Precision Class (>3?10 ?m)

Standard Precision Class (>10 ?m)

### Segmentation by Maximum Bond Force Class:

Low Force Class (?100 N)

Medium Force Class (>100?350 N)

High Force Class (>350?500 N)

Ultra-High Force Class (>500 N)

### Segmentation by Application:

SiPhotonics

Optical Device Packaging

Data Communication / 5G

3D Sensor / LiDAR

Augmented Reality

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 Limited

Mycronic AB

Toray Industries, Inc.

FUJI CORPORATION

Finetech GmbH & Co. KG

ficonTEC Service GmbH

BE Semiconductor Industries N.V.

Kaijo Corporation

Panasonic Holdings Corporation

Yamaha Motor Co., Ltd.

Hanwha Semitech Co., Ltd.

Guangzhou Nuoding Intelligent Technology Co., Ltd.

FOUR TECHNOS Co., Ltd.

### Key Questions Addressed in this Report

What is the 10-year outlook for the global CoS Die-Bonder market?

What factors are driving CoS Die-Bonder market growth, globally and by region?

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

How do CoS Die-Bonder market opportunities vary by end market size?

How does CoS Die-Bonder break out by Type, by Application?

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