

Global Laser Chip COS (Chip on Submount) Equipment Market Growth 2026-2032

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Abstracts

The global Laser Chip COS (Chip on Submount) Equipment market size is predicted to grow from US\$ 130 million in 2025 to US\$ 296 million in 2032; it is expected to grow at a CAGR of 12.0% from 2026 to 2032.

Laser chip COS equipment refers to high-precision back-end assembly equipment used for packaging laser diodes, VCSELs, photodiodes, silicon photonics chips, and high-power laser chips. Its core task is to reliably attach bare laser chips or optoelectronic chips onto submounts, carriers, ceramic substrates, metal heat sinks, or module carriers, thereby addressing optical-axis positioning, thermal-resistance control, bonding voids, placement consistency, and mass-production yield. This type of equipment typically integrates high-precision motion stages, dynamic vision recognition, die pick-up, flip-chip or face-up placement, bond-force control, pulse heating, localized laser heating, eutectic soldering, epoxy dispensing or stamping, UV curing, process logging, and post-bond inspection. Typical processes include AuSn eutectic bonding, solder reflow, thermo-compression bonding, epoxy die attach, flip-chip bonding, and sequential multi-die placement. Typical applications cover COC, COS, COB, P-side-down laser diode attachment, VCSEL modules, optical transceiver modules, data-center AOC, silicon photonics packaging, high-power fiber-laser pump sources, LiDAR, and precision optoelectronic sensing. Major customers include laser-chip manufacturers, optical-module producers, silicon photonics packaging companies, LiDAR transmitter manufacturers, high-power laser manufacturers, advanced packaging houses, and research or pilot-production platforms. Commercial delivery is mainly based on equipment sales, supplemented by process development, fixture customization, automated loading and unloading, testing and sorting, software traceability, spare-parts maintenance, and production-line integration services.

Laser chip COS equipment occupies the most critical high-precision back-end assembly position in the optoelectronic packaging value chain. It is not a general-purpose placement machine, but a piece of equipment built around coordinated thermal, optical, electrical, and mechanical control from the laser chip to the submount or carrier. Compared with ordinary die bonders, this type of equipment must simultaneously address small-die pick-up, optical-axis edge alignment, stable bonding force, uniform AuSn eutectic bond lines, heat-sink thermal paths, and post-bond visual inspection. Therefore, equipment capability is typically reflected in placement accuracy, cycle time, temperature control, force range, chip-size compatibility, sequential multi-die placement, and process-data traceability. ASMPT AMICRA CoS directly defines its system as a dedicated platform for Chip on Submount applications, with $\pm 1.5\mu\text{m}$ -level accuracy, 6 to 10 second cycle time, laser or pulse heating, epoxy stamping, and post-bond inspection. Mycronic MRSI links high-precision die bonders with CoC, CoS, and CoB assembly, eutectic and epoxy processes, high-speed tool change, and parallel processing, indicating that the industry is upgrading from point placement to flexible volume-production platforms.

From a competitive-landscape perspective, European, American, and Japanese companies still lead in high precision, photonics packaging experience, and process ecosystems. ASMPT AMICRA, Mycronic MRSI, Palomar, ficonTEC, Finetech, and SET cover dedicated CoS equipment, photonic-device assembly platforms, laser-diode placement cases, and R&D or pilot-line flip-chip bonders. Palomar 6500 clearly supports P-side-down laser diode attachment, VCSEL modules, and optoelectronic packaging, while ficonTEC emphasizes motion control, active alignment, multiple bonding methods, and electro-optical testing in photonic micro-assembly. Japan's Shibuya FDB210/211 is directly positioned for optical communication and optical devices, covering laser diode bonding, sub-mount bonding, and silicon photonics bonding with $\pm 2\mu\text{m}$ accuracy. By contrast, mainland Chinese companies are entering the market through eutectic bonders, optical-module die bonders, and COC/COS-specific processes. Bozhon, Microview, and Lieqi all show COC/COS application descriptions on their product pages, indicating that domestic equipment is accelerating its shift from general die attach toward optical-communication-specific packaging.

From the demand side, the long-term growth logic for laser chip COS equipment comes from optical-communication speed upgrades, data-center optical interconnect expansion, increasing silicon-photonics packaging complexity, growth in VCSEL and LiDAR sensing devices, and continuous iteration of high-power industrial laser modules. Downstream customer requirements are expanding from placement accuracy alone to full-process yield, process traceability, automated loading and unloading, high-mix

product switching, and closed-loop testing. FitTech's COC-COS testing and sorting system shows that a COS production line now requires not only bonding equipment, but also LIV, Far Field, high-temperature measurement, and package-level testing and sorting equipment. ficonTEC's page also shows that photonic-device manufacturing is moving toward more automated production systems that integrate die-level assembly, package-level testing, electro-optical testing, and statistical traceability. Future industry opportunities are more likely to concentrate in high-precision eutectic bonding, photonic-device active alignment, silicon photonics and optical-module volume packaging, domestic substitution, and turnkey line-delivery capability, rather than price competition in low-end standalone placement machines.

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

This Insight Report provides a comprehensive analysis of the global Laser Chip COS (Chip on Submount) 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 Laser Chip COS (Chip on Submount) Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Laser Chip COS (Chip on Submount) Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Laser Chip COS (Chip on Submount) 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 Laser Chip COS (Chip on Submount) Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Laser Chip COS (Chip on Submount) Equipment market by product

type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fully Automatic

Semi-Automatic

Segmentation by Bonding Process Route:

Eutectic Or Solder Bonding

Epoxy Or Adhesive Bonding

Thermo-Compression Or Flip-Chip Bonding

Testing And Inspection Only

Segmentation by Heating And Energy Input Method:

Pulse Heating

Localized Laser Heating

Heated Stage Or Thermo-Compression Heating

Non-Bonding Measurement Input

Segmentation by Application:

Optical Communication Device Packaging

Data Center Optical Interconnect Packaging

Industrial And Medical High-Power Laser Packaging

Automotive And Consumer 3D Sensing Packaging

Research And Process Development 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

Mycronic AB

Palomar Technologies, Inc.

ficonTEC Service GmbH

Dr. Tresky AG

Finetech GmbH & Co. KG

SET Corporation SA

Shibuya Corporation

Toray Engineering Co., Ltd.

Yuasa Electronics Co., Ltd.

Alphax Co., Ltd.

Hanwha Precision Machinery Co., Ltd.

Bozhon Precision Industry Technology Co., Ltd.

Microview Intelligent Packaging Technology (Shenzhen) Co., Ltd.

Suzhou Lieqi Intelligent Equipment Co., Ltd.

FitTech Co., Ltd.

Kulicke and Soffa Industries, Inc.

BE Semiconductor Industries N.V.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Laser Chip COS (Chip on Submount) Equipment market?

What factors are driving Laser Chip COS (Chip on Submount) Equipment market growth, globally and by region?

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

How do Laser Chip COS (Chip on Submount) Equipment market opportunities vary by end market size?

How does Laser Chip COS (Chip on Submount) Equipment break out by Type, by Application?

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