

Global Photonics Die Bonding Equipment Market Growth 2026-2032

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Abstracts

The global Photonics Die Bonding Equipment market size is predicted to grow from US\$ 137 million in 2025 to US\$ 334 million in 2032; it is expected to grow at a CAGR of 13.5% from 2026 to 2032.

Photonics Die Bonding Equipment refers to specialized packaging equipment used to accurately place and bond silicon photonics chips, III-V laser dies, modulators, detectors, photonic integrated circuits, micro-optical elements, or heterogeneous photonic integration chips onto photonic integrated circuits, silicon platforms, interposers, wafers, carriers, or co-packaged optics modules. These systems typically integrate a sub-micron motion platform, top-and-bottom vision or infrared vision, die pick-and-flip handling, active or passive optical alignment, eutectic bonding, thermocompression bonding, laser welding, epoxy curing, bond-force control, and process-control software. Key evaluation metrics include placement accuracy, optical coupling efficiency, angular error, thermal drift, low-stress bonding, and production repeatability. Major production regions include Germany, the United States, Singapore, Sweden, France, Japan, and China, while typical applications include silicon photonics transceiver chips, CPO optical engines, on-chip laser integration, photonic sensing, quantum photonic devices, high-speed optical interconnects, and advanced photonic packaging R&D and mass production.

In 2025, global production of photonics die bonding equipment reached approximately 85-105 units, with mainstream FOB prices of about 1.10-2.20 million USD per unit. Lower-end configurations were mainly used in universities, research institutes, silicon photonics pilot lines, and small-batch heterogeneous integration validation, while high-end configurations typically featured sub-micron placement, active optical alignment, wafer-level handling, eutectic bonding, thermocompression bonding, laser welding, or

automated loading capabilities, serving silicon photonics, photonic integrated circuits, co-packaged optics, optical engines, high-speed optical interconnects, and high-reliability photonic integration packaging.

The global Photonics Die Bonding Equipment market is shifting from an R&D-oriented equipment segment to a high-value production equipment segment. AI data centers, 800G and 1.6T optical interconnects, silicon photonics, co-packaged optics, photonic integrated circuits, and heterogeneous integration are redefining the boundaries of advanced packaging. Photonics die bonding equipment is therefore evolving from a high-precision placement tool into a critical manufacturing platform that integrates optical alignment, bonding, inspection, and process control. Compared with conventional die placement, photonics die bonding must ensure not only chip placement accuracy, but also optical coupling efficiency, mode matching, thermal stability, and long-term reliability. As a result, equipment prices, process barriers, and customer qualification cycles are significantly higher. As cloud service providers, switch-chip suppliers, optical module manufacturers, silicon photonics foundry platforms, and specialized photonic packaging service providers accelerate investment, systems with high precision, high stability, multi-process compatibility, and automation scalability will become a major focus of capital spending.

The main challenges come from incomplete process standardization, strong customer customization, difficult yield ramp-up, and concentrated supply of critical motion-control and optical-alignment modules. Different photonic chips vary substantially in material system, coupling structure, solder system, coefficient of thermal expansion, and package architecture, which requires equipment suppliers to provide strong application engineering capabilities rather than standardized hardware alone. Future demand will continue to be driven by high-bandwidth, low-power, and high-density optical interconnects, while the mass production of CPO and silicon photonics will push equipment from semi-automatic and pilot-line platforms toward fully automated, high-throughput, high-yield systems. Competitive differentiation will move from placement accuracy alone to a combined contest of accuracy, speed, optical coupling efficiency, process databases, automated inspection, and full-line integration capability.

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

world Photonics Die Bonding Equipment industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Photonics Die 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 Photonics Die Bonding Equipment.

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

Segmentation by Type:

Chip to Photonic Integrated Circuit Bonders

Chip to Wafer Bonders

Chip to Interposer Bonders

Others

Segmentation by Alignment Method:

Active Optical Alignment

Passive Vision Alignment

Hybrid Passive and Active Alignment

Segmentation by Bonding Process:

Eutectic Solder Bonding

Thermocompression Bonding

Epoxy and UV Curing

Others

Segmentation by Package Architecture:

Heterogeneous Photonic Integration Packages

Co Packaged Optics Packages

Silicon Photonics Transceiver Packages

Others

Segmentation by Application:

Silicon Photonics Devices

Co Packaged Optics Devices

Photonic Integrated Circuit Devices

Others

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.

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 Addressed in this Report

What is the 10-year outlook for the global Photonics Die Bonding Equipment market?

What factors are driving Photonics Die Bonding Equipment market growth, globally and by region?

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

How do Photonics Die Bonding Equipment market opportunities vary by end market size?

How does Photonics Die Bonding Equipment break out by Type, by Application?

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