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Global Silicon Photonics IC Testing Machine Market Growth 2026-2032

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Abstracts

The global Silicon Photonics IC Testing Machine market size is predicted to grow from US$ 158 million in 2025 to US$ 1015 million in 2032; it is expected to grow at a CAGR of 30.7% from 2026 to 2032.

Silicon Photonics IC Test System refers to an integrated optoelectronic test platform used to characterize, screen and validate silicon photonics integrated circuits, devices or assemblies across different process stages, including wafer-level, die-level and package-level testing. The system typically integrates a high-precision probe station or positioning platform, optical fiber or fiber-array alignment modules, electrical and RF probing units, tunable lasers, optical power meters, polarization control, source-measure units, vector network analyzers, bit-error-rate testers, machine vision, test automation software and data acquisition systems.

It is used to couple optical signals into and out of silicon photonics devices through grating couplers, edge couplers or other optical interfaces, while simultaneously applying electrical or RF signals to modulators, photodetectors, heaters, drivers or related test structures. Typical test parameters include insertion loss, return loss, polarization-dependent loss, wavelength response, responsivity, dark current, modulation bandwidth, S-parameters, eye diagrams, bit-error rate, optical power stability and device-level yield. In commercial equipment market sizing, however, most system-level offerings are centered on wafer-level or on-wafer testing before dicing and packaging.

The silicon photonics IC test system market is moving from a research- and engineering-validation-oriented equipment segment toward a wafer-level production screening market. Its core growth driver is no longer limited to conventional optical communication

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testing, but increasingly comes from AI data centers, CPO/Optical I/O, high-speed optical interconnects and silicon photonics foundry platforms, all of which require wafer-level yield control, known-good-die pre-screening and high-throughput electro-optical test capability. Unlike traditional optical module testing, silicon photonics testing is moving upstream to the wafer stage, before dicing and packaging. At this stage, the system needs to measure optical, electrical, RF and electro-optical parameters directly on the wafer through a wafer prober, optical fiber or fiber-array alignment unit, electrical/RF probes, optical instruments, wafer-map software and automated test execution.

From a product perspective, the core of the system is usually a probe station or wafer prober, combined with grating-coupling, edge-coupling or vertical-coupling capability. The testing process must support precise optical coupling, low-loss signal transmission, repeatable probe positioning, wafer-map-based automatic addressing, and synchronized optical/electrical data acquisition. Typical test items include insertion loss, return loss, polarization-dependent loss, wavelength response, responsivity, dark current, modulation bandwidth, S-parameters, eye diagrams, bit-error rate and die-level yield. The technical barrier of this market does not lie in a single instrument, but in the integration of precision motion control, optical alignment, semiconductor probing, high-speed electrical/RF testing and automated data management.

On the supply side, the market is characterized by the participation of several types of vendors: semiconductor probe station manufacturers, electro-optical test instrument suppliers, photonics automation equipment companies and local system integrators. FormFactor and MPI are strong in wafer probing platforms, wafer handling and high-precision probe systems. Keysight and Teradyne have advantages in test instruments, ATE platforms, high-speed measurement and production test software ecosystems. ficonTEC and FIBERPRO focus more on photonic automation, active optical alignment, fiber-array coupling and customized electro-optical test cells. Chinese suppliers such as Semight, Eoulu, Eternal Technologies, YANMADE, GBITEST, Sunyu Photonics, Chengrui Technology and EoneSemi are entering the market through wafer-level optical coupling, probe platform integration, automated test software and customized system delivery.

Overall, the value proposition of silicon photonics test systems is shifting from “whether the system can measure electro-optical parameters” to “whether it can perform stable, repeatable and high-throughput wafer-level screening and yield feedback.” As silicon photonics moves toward volume manufacturing, especially in AI data center and CPO-related applications, the competitive focus will increasingly concentrate on 300 mm

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compatibility, full automation, ATE integration, multi-channel fiber-array coupling, edge/grating coupling compatibility, optical alignment speed, measurement repeatability and production data traceability. In this context, wafer-level silicon photonics test systems are becoming a critical enabling tool for silicon photonics industrialization, rather than a peripheral laboratory test platform.

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

This Insight Report provides a comprehensive analysis of the global Silicon Photonics IC Testing Machine 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 Silicon Photonics IC Testing Machine portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Silicon Photonics IC Testing Machine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Silicon Photonics IC Testing Machine 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 Silicon Photonics IC Testing Machine.

This report presents a comprehensive overview, market shares, and growth opportunities of Silicon Photonics IC Testing Machine market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

200 mm Silicon Photonics Wafer Test Systems

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300 mm Silicon Photonics Wafer Test Systems

Others

Segmentation by Application:

Data Center Optical Interconnect

Telecom & Optical Communication

SiPh Foundry & Wafer Manufacturing

Advanced Packaging & OSAT

Quantum Photonics & Research

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- 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.

- FormFactor

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Aehr Test System

Suzhou Eoulu

MPI Corporation

Suzhou Semight Instruments

Keysight

STAr Technologies

FIBERPRO

Wuhan Eternal Technologies

Shenzhen Brightas Communication Equipment

Suzhou Chengrui Technology

Shanghai Everise Electronic Technology

ficonTEC

Shenzhen Yanmade Technology (AxisTec)

Shenzhen GBITEST

Sunyu Photonics

Shanghai Everise Electronic Technology

Changsha EoneSemi

Key Questions Addressed in this Report

What is the 10-year outlook for the global Silicon Photonics IC Testing Machine

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market?

What factors are driving Silicon Photonics IC Testing Machine market growth, globally and by region?

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

How do Silicon Photonics IC Testing Machine market opportunities vary by end market size?

How does Silicon Photonics IC Testing Machine break out by Type, by Application?

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