

# Global Advanced Bonding Equipment Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Advanced Bonding Equipment market size is expected to reach \$ 1680 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Advanced Bonding Equipment should be defined as the set of core process tools used to create high-precision, high-cleanliness, and high-reliability bonded interfaces across wafer-to-wafer (W2W), die-to-wafer (D2W/C2W), and chip-to-chip (C2C) structures, mainly for heterogeneous integration, 3D stacking, ultra-fine-pitch interconnects, ultra-thin wafer support, hermetic/vacuum packaging, and low-temperature or room-temperature material integration. The scope should include two major categories: wafer bonding equipment, covering permanent bonding, direct/fusion bonding, hybrid bonding, room-temperature/surface-activated bonding, anodic bonding, wafer-level thermo-compression/metal diffusion bonding, and temporary bonding/debonding; and advanced chip bonding equipment, but only when the tools are explicitly designed for hybrid bonding, direct bonding, or thermo-compression bonding (TCB) in high-density interconnect applications. By contrast, conventional die bonders, wire bonders, and standard flip-chip bonders should be excluded because they are primarily general assembly, wire interconnect, or standard packaging placement tools rather than advanced bond-interface formation platforms.

In practical industry terms, advanced bonding equipment has evolved from a market once centered on MEMS, CIS, engineered substrates, and wafer-level packaging into a strategic equipment segment increasingly driven by advanced packaging, HBM, chiplets, 2.5D/3D integration, AI, and HPC. The clearest technology trajectory today is that W2W hybrid bonding has already developed a relatively solid foundation in applications such as CIS and NAND, while D2W/C2W hybrid bonding is accelerating

with chiplet and HBM demand; temporary bonding/debonding has become a key enabler for wafer thinning and stacked-device manufacturing; and equipment platforms are moving toward more integrated, modular, and production-oriented architectures combining cleaning, activation, metrology, bonding, and debonding. SUSS explicitly positions TBDB as a core platform and hybrid bonding as a growth vector, while Applied Materials? Kinex integrates wet clean, plasma activation, degas, metrology, and bonding into a unified high-volume platform. Besi, ASMPT, Shibaura, and SET are also reinforcing their hybrid bonding and TCB portfolios.

The major growth drivers for advanced bonding equipment can be summarized into four dimensions. First, AI, HPC, HBM, and chiplet architectures are increasing demands for bandwidth density, interconnect density, and energy efficiency, accelerating the adoption of hybrid bonding and TCB. Second, ultra-thin wafer thinning, transport, and stacking are driving stronger demand for temporary bonding and debonding. Third, applications such as MEMS, CIS, engineered substrates, power devices, compound semiconductors, and III-V/optical devices continue to require lower thermal budgets, higher vacuum capability, lower particle levels, and broader material compatibility. Fourth, as advanced packaging faces simultaneous pressure on yield and cost, equipment competition is shifting toward overlay accuracy, cleanliness control, inline metrology, void/defect suppression, and overall cost-of-ownership optimization. As a result, advanced bonding equipment should be viewed not simply as a packaging sub-segment, but as a cross-domain strategic equipment category linking front-end material engineering, wafer processing, and advanced integration.

This report studies the global Advanced Bonding Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Advanced Bonding Equipment and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Advanced Bonding Equipment that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Advanced Bonding Equipment total production and demand, 2021-2032, (Units)  
Global Advanced Bonding Equipment total production value, 2021-2032, (USD Million)  
Global Advanced Bonding Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)  
Global Advanced Bonding Equipment consumption by region & country, CAGR,

2021-2032 & (Units)

U.S. VS China: Advanced Bonding Equipment domestic production, consumption, key domestic manufacturers and share

Global Advanced Bonding Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Advanced Bonding Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Advanced Bonding Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Advanced Bonding Equipment market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EV Group, SUSS MicroTec, Tokyo Electron, Applied Microengineering Ltd (AML), Nidec Machine Tool, Ayumi Industry, Shanghai Micro Electronics, U-Precision Tech, Hutem, Canon, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Advanced Bonding Equipment market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Advanced Bonding Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Advanced Bonding Equipment Market, Segmentation by Type:

Wafer Bonding Equipment

Chip Bonding Equipment

#### Global Advanced Bonding Equipment Market, Segmentation by Degree of Automation:

Fully Automatic Bonding Equipment

Semi Automatic Bonding Equipment

#### Global Advanced Bonding Equipment Market, Segmentation by Bonding Technology:

Permanent Bonding

Temporary Bonding/Debonding

#### Global Advanced Bonding Equipment Market, Segmentation by Application:

Advanced Packaging & Heterogeneous Integration

MEMS/Sensor Packaging

CIS

## RF / Photonics / Compound-Semiconductor Devices

## Companies Profiled:

EV Group

SUSS MicroTec

Tokyo Electron

Applied Microengineering Ltd (AML)

Nidec Machine Tool

Ayumi Industry

Shanghai Micro Electronics

U-Precision Tech

Hutem

Canon

Bondtech

TAZMO

Aimechatec

Besi

ASMPT Ltd

Applied Materials

Shibaura Mechatronics

SET (Smart Equipment Technology)

Kostek Systems

Mycronic

Kulicke & Soffa

Saultech Technology

Skytech Group

BestBon Co., Ltd.

iSABers Group

Suzhou iWISEETEC

Piotech, Inc

Kingsemi

Wisdom Semiconductor Technology

Suzhou Maxwell Technologies

Qinghui Semiconductor

Sintaike Semiconductor Equipment (Shanghai) Co., Ltd.

Larcom Semiconductor Equipment (Shanghai) Co., Ltd.

Wushi Microelectronics (Suzhou) Co., Ltd.

Bio-Nano Semi-conductor Equipment (ZheJiang) Co.,Ltd

Haichuang Intelligent Equipment (Yantai) Co., Ltd.

## Circuit Fabology Microelectronics Equipment

iSTAR

### **Key Questions Answered:**

1. How big is the global Advanced Bonding Equipment market?
2. What is the demand of the global Advanced Bonding Equipment market?
3. What is the year over year growth of the global Advanced Bonding Equipment market?
4. What is the production and production value of the global Advanced Bonding Equipment market?
5. Who are the key producers in the global Advanced Bonding Equipment market?
6. What are the growth factors driving the market demand?

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