

Global HBM Memory Thermal Compression Bonding Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HBM Memory Thermal Compression Bonding Equipment market size is expected to reach \$ 3069 million by 2032, rising at a market growth of 23.4% CAGR during the forecast period (2026-2032).

In 2025, global HBM Memory Thermal Compression Bonding Equipment production reached approximately 378 units, with an average global market price of around US\$1,800,000 per unit.

The gross profit margin of major companies in the industry is between 35%-58%.

In 2025, the global production capacity of HBM Memory Thermal Compression Bonding Equipment was approximately 504 units.

HBM Memory Thermal Compression Bonding Equipment is advanced packaging equipment used to stack and bond high-bandwidth memory dies through precise alignment, heat, pressure, and micro-bump interconnection. It supports high placement accuracy, bonding force control, temperature uniformity, throughput stability, and process reliability for memory stacks used in artificial intelligence accelerators and advanced semiconductor packages.

The industrial chain of HBM Memory Thermal Compression Bonding Equipment covers upstream components such as precision stages, bonding heads, heaters, vision systems, force sensors, motion controllers, vacuum systems, software, and cleanroom modules. The midstream consists of equipment design, precision assembly, thermal control integration, alignment calibration, process recipe development, reliability testing,

and customer validation. Downstream applications mainly include high-bandwidth memory packaging, advanced logic-memory integration, chiplet packaging, artificial intelligence accelerators, data center processors, and high-end semiconductor assembly lines.

This report studies the global HBM Memory Thermal Compression Bonding Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HBM Memory Thermal Compression 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 HBM Memory Thermal Compression Bonding Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global HBM Memory Thermal Compression Bonding Equipment total production and demand, 2021-2032, (Units)

Global HBM Memory Thermal Compression Bonding Equipment total production value, 2021-2032, (USD Million)

Global HBM Memory Thermal Compression Bonding Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global HBM Memory Thermal Compression Bonding Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: HBM Memory Thermal Compression Bonding Equipment domestic production, consumption, key domestic manufacturers and share

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

Global HBM Memory Thermal Compression Bonding Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global HBM Memory Thermal Compression Bonding Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global HBM Memory Thermal Compression 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 HANMI

Semiconductor, ASMPT, BE Semiconductor Industries, Kulicke & Soffa, SEMES, Toray Engineering, Shinkawa, Shibaura Mechatronics, Smart Equipment Technology, Hanwha Semitech, 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 HBM Memory Thermal Compression 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 HBM Memory Thermal Compression Bonding Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HBM Memory Thermal Compression Bonding Equipment Market, Segmentation

Global HBM Memory Thermal Compression Bonding Equipment Supply, Demand and Key Producers, 2026-2032

by Type:

- Die-to-Wafer Bonding Equipment
- Wafer-to-Wafer Bonding Equipment
- Chip-to-Substrate Bonding Equipment

Global HBM Memory Thermal Compression Bonding Equipment Market, Segmentation by System Configuration:

- Single-Head Bonding Equipment
- Multi-Head Bonding Equipment
- Fully Automatic Bonding Line

Global HBM Memory Thermal Compression Bonding Equipment Market, Segmentation by Placement Accuracy:

- Standard Accuracy ($\pm 3\text{mm}$)
- High Accuracy ($\pm 1\text{--}3\text{mm}$)
- Ultra-High Accuracy ($\pm 1\text{mm}$)

Global HBM Memory Thermal Compression Bonding Equipment Market, Segmentation by Application:

- AI Accelerator Packaging
- High-Performance Computing Chips
- Advanced Memory Packaging
- Other

Companies Profiled:

HANMI Semiconductor

ASMPT

BE Semiconductor Industries

Kulicke & Soffa

SEMES

Toray Engineering

Shinkawa

Shibaura Mechatronics

Smart Equipment Technology

Hanwha Semitech

Pulinx Intelligent

U-Precision Tech

Maxwell Technologies

Micraft System Plus

Key Questions Answered:

1. How big is the global HBM Memory Thermal Compression Bonding Equipment market?
2. What is the demand of the global HBM Memory Thermal Compression Bonding Equipment market?
3. What is the year over year growth of the global HBM Memory Thermal Compression

Bonding Equipment market?

4. What is the production and production value of the global HBM Memory Thermal Compression Bonding Equipment market?

5. Who are the key producers in the global HBM Memory Thermal Compression Bonding Equipment market?

6. What are the growth factors driving the market demand?

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