

Global HBM Thermal Compression Bonding Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global HBM Thermal Compression Bonding Equipment market size was valued at US\$ 1008 million in 2025 and is forecast to a readjusted size of US\$ 4567 million by 2032 with a CAGR of 24.0% during review period.

In 2025, global HBM Thermal Compression Bonding Equipment production reached approximately 306 units, with an average global market price of around USD 3,200,000 per unit.

The gross profit margin of major companies in the industry is between 32.48%?56.72%.

In 2025, the global production capacity of HBM Thermal Compression Bonding Equipment was approximately 403 units.

HBM Thermal Compression Bonding Equipment is advanced semiconductor packaging equipment used to bond stacked high-bandwidth memory dies through controlled heat, pressure and alignment. It supports fine-pitch micro-bump bonding, hybrid bonding preparation or thermocompression processes required for high-density memory stacks and advanced AI chips. The equipment requires high placement accuracy, temperature uniformity, force control, clean process environment and high throughput. The market includes thermocompression bonders and related bonding systems for HBM packaging, but excludes general wire bonders, flip-chip bonders for standard packages and finished HBM products.

The industry chain includes precision stages, bonding heads, heaters, force sensors,

vision systems, alignment modules, vacuum chucks, control software, cleanroom components and metrology tools. Midstream production covers mechanical design, thermal control, motion calibration, vision alignment, software integration, process qualification, reliability testing and installation services. Downstream demand comes from advanced packaging lines, memory packaging, AI chip production, foundry packaging services and outsourced assembly facilities. Growth is driven by HBM capacity expansion, AI accelerator demand, advanced packaging adoption and finer interconnect requirements.

This report is a detailed and comprehensive analysis for global HBM Thermal Compression Bonding Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global HBM Thermal Compression Bonding Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global HBM Thermal Compression Bonding Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global HBM Thermal Compression Bonding Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global HBM Thermal Compression Bonding Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for HBM Thermal Compression Bonding Equipment

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global HBM Thermal Compression Bonding Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HANMI Semiconductor, ASMPT, Besi, Kulicke & Soffa Industries, Hanwha Semitech, SEMES, Toray Engineering, Shibaura Mechatronics, Yamaha Robotics, PrecisoNext Intelligent Technology, etc.

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

Market Segmentation

HBM Thermal Compression Bonding Equipment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Chip-to-Wafer TCB Equipment

Chip-to-Substrate TCB Equipment

Die-to-Die TCB Equipment

Market segment by Equipment Configuration

Single-Head TCB Equipment

Multi-Head TCB Equipment

Cluster TCB Equipment

Market segment by Placement Accuracy

Standard Accuracy??3 ?m?

High Accuracy??1.5 ?m?

Ultra-High Accuracy????1 ?m?

Market segment by Application

HBM Packaging

2.5D Advanced Packaging

3D IC Packaging

Other

Major players covered

HANMI Semiconductor

ASMPT

Besi

Kulicke & Soffa Industries

Hanwha Semitech

SEMES

Toray Engineering

Shibaura Mechatronics

Yamaha Robotics

PrecisioNext Intelligent Technology

Micraft System Plus

Suzhou Maxwell Technologies

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe HBM Thermal Compression Bonding Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of HBM Thermal Compression Bonding Equipment, with price, sales quantity, revenue, and global market share of HBM Thermal Compression Bonding Equipment from 2021 to 2026.

Chapter 3, the HBM Thermal Compression Bonding Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers

are analyzed emphatically by landscape contrast.

Chapter 4, the HBM Thermal Compression Bonding Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and HBM Thermal Compression Bonding Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of HBM Thermal Compression Bonding Equipment.

Chapter 14 and 15, to describe HBM Thermal Compression Bonding Equipment sales channel, distributors, customers, research findings and conclusion.

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