

Global IC Bonder Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global IC Bonder market size is expected to reach \$ 1409 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

IC Bonder, commonly referred to as Die Bonder or Die Attach Equipment, is a type of semiconductor assembly equipment used in the back-end packaging process. It is designed to pick individual semiconductor dies from a wafer, wafer frame, tray, or other carriers, and accurately place and attach them onto a lead frame, package substrate, ceramic substrate, or module carrier using bonding materials such as epoxy, solder, sinter paste, or eutectic alloys, or through advanced interconnection methods such as flip-chip bonding and thermo-compression bonding. The IC bonder ensures precise alignment, mechanical fixation, thermal conduction, and, in certain packaging structures, electrical interconnection of the die, serving as a critical process step prior to wire bonding, molding, underfill, or module assembly.

In 2025, global sales of C Bonder reached approximately 1,650 units, with an average global market price of around US\$ 562 K/unit. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 30% to 60%.

The IC bonder (die bonder) market represents a mature yet indispensable segment within semiconductor assembly equipment. Its demand is closely tied to global packaging capacity expansion rather than wafer fabrication itself. While conventional leadframe-based packaging still dominates the installed base, incremental demand is increasingly shifting toward advanced packaging. In applications such as AI accelerators, high-performance computing, and advanced memory, die bonding is evolving from a basic placement process into a precision-critical interconnection step,

significantly raising technical requirements.

Growth in this market is driven more by increasing packaging complexity than by unit semiconductor volume alone. Automotive electronics and power semiconductors (SiC/GaN) are pushing demand for high-reliability bonding technologies such as eutectic bonding and silver sintering. At the same time, emerging applications including Micro LED, optoelectronics, and sensors are driving demand for ultra-high precision and high-speed die placement. Furthermore, the rapid adoption of advanced packaging architectures such as chiplets and 3D integration is reinforcing the importance of high-end die bonding equipment, particularly thermo-compression bonding and flip-chip systems.

From a competitive perspective, the market is highly concentrated, dominated by a few leading players primarily based in Japan, Europe, and Hong Kong/China. Core technological barriers lie in motion control, vision alignment, and process integration. Looking ahead, the market is expected to evolve toward platform-based and modular equipment architectures, increasingly integrated with materials and packaging processes. While overall growth remains moderate, structural upgrading driven by advanced packaging will continue to reshape the industry.

This report studies the global IC Bonder production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for IC Bonder 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 IC Bonder that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global IC Bonder total production and demand, 2021-2032, (Unit)

Global IC Bonder total production value, 2021-2032, (USD Million)

Global IC Bonder production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Unit), (based on production site)

Global IC Bonder consumption by region & country, CAGR, 2021-2032 & (Unit)

U.S. VS China: IC Bonder domestic production, consumption, key domestic manufacturers and share

Global IC Bonder production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Unit)

Global IC Bonder production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Unit)

Global IC Bonder production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Unit)

This report profiles key players in the global IC Bonder 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 Besi, ASMPT, Kulicke & Soffa, Panasonic, Kaijo Corporation, Palomar Technologies, Shinkawa, DIAS Automation, Toray Engineering, Fasford Technology, 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 IC Bonder market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Unit) and average price (K 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 IC Bonder Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IC Bonder Market, Segmentation by Type:

Fully Automatic

Semi-Automatic

Manual

Global IC Bonder Market, Segmentation by Bonding Mechanism:

Epoxy Die Bonder

Eutectic Die Bonder

Solder Die Bonder

Silver Sinter Die Bonder

Flip-Chip Bonder

Thermo-Compression Bonder

Global IC Bonder Market, Segmentation by Throughput:

Low-Throughput (10,000 UPH)

Global IC Bonder Market, Segmentation by Application:

Conventional IC Packaging

Advanced Packaging

Power Semiconductor Packaging

MEMS and Sensor Packaging

Other

Companies Profiled:

Besi

ASMPT

Kulicke & Soffa

Panasonic

Kaijo Corporation

Palomar Technologies

Shinkawa

DIAS Automation

Toray Engineering

Fasford Technology

West-Bond

Hybond

Mycronic

ITEC Equipment

Key Questions Answered:

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

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