

Global Permanent Bonding Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Permanent Bonding Systems market size is expected to reach \$ 2422 million by 2032, rising at a market growth of 17.4% CAGR during the forecast period (2026-2032).

Semiconductor Permanent Wafer Bonding Systems refer to specialized semiconductor manufacturing equipment used to form durable, process-stable bonds between wafers, dies, chips, or heterogeneous substrates for applications such as advanced packaging, MEMS, CMOS image sensors, engineered substrates, compound semiconductors, silicon photonics, chiplets, HBM, and 3D heterogeneous integration. These systems typically combine wafer or die handling, surface preparation interfaces, high-precision alignment, controlled atmosphere or vacuum environments, thermal and pressure control, bond initiation, interface formation, process monitoring, and data control. Major bonding technologies include hybrid bonding, fusion/direct bonding, surface-activated room-temperature bonding, atomic diffusion bonding, anodic bonding, eutectic bonding, diffusion bonding, and selected permanent adhesive bonding processes. As device scaling increasingly depends on vertical integration, fine-pitch interconnects, lower power consumption, and heterogeneous material integration, permanent wafer bonding systems are moving from MEMS and CIS process tools toward strategic equipment platforms for advanced packaging and 3D IC manufacturing.

Semiconductor permanent wafer bonding systems have evolved from a niche process equipment category for MEMS, CIS and engineered substrates into a strategic platform for advanced packaging and 3D heterogeneous integration. Historically, the equipment was mainly used for wafer-level MEMS encapsulation, backside-illuminated CMOS image sensors, SOI substrates and heterogeneous material integration, where bonding strength, vacuum sealing, substrate compatibility and wafer handling were the primary

requirements. The industry is now shifting toward hybrid bonding, direct bonding and integrated bonding clusters driven by AI/HPC, chiplets, HBM, silicon photonics and 3D IC architectures. Hybrid bonding is particularly important because it combines dielectric bonding with metal-to-metal interconnects, enabling finer pitch, lower power and higher interconnect density than conventional bump-based approaches. Therefore, the appropriate research scope should not be a broad 'wafer bonder' category, but a narrower semiconductor permanent wafer bonding equipment market, with hybrid bonding systems treated as the highest-growth sub-segment.

From the supply-side perspective, the global competitive landscape remains concentrated among a small group of European, Japanese and U.S. equipment suppliers. European companies have strong positions in permanent wafer bonding, high-precision alignment, hybrid bonding and high-volume production platforms. Japanese suppliers contribute differentiated capabilities in room-temperature bonding, atomic diffusion bonding, wafer-level bonding and MEMS/CIS-oriented process tools. U.S. participation is becoming more significant through integrated die-to-wafer hybrid bonding platforms that combine multiple process steps into a cluster. China and South Korea are entering a faster catch-up phase during 2024-2026. Korean suppliers are primarily driven by HBM-related hybrid bonding requirements, while Chinese suppliers are building product lines across W2W, D2W/C2W hybrid bonding, surface-activated bonding and wafer bonding/debonding equipment. The broader vendor pool is expanding, but the number of companies that can be classified as core formal suppliers remains limited due to demanding requirements in nanometer-level alignment, cleanliness, wafer deformation control, bond interface defect control and process repeatability.

From the demand-side perspective, the global semiconductor permanent wafer bonding systems near-term growth is supported by advanced logic, AI accelerators, stacked CIS, MEMS, engineered substrates and early HBM-related hybrid bonding evaluations. Over the medium term, the market upside will depend on how rapidly hybrid bonding is adopted in HBM4E/HBM5, 3D SRAM, logic-on-logic, memory-on-logic and chiplet-on-wafer architectures. At the same time, thermocompression bonding, MR-MUF, micro-bumps and other mature interconnect technologies will continue to compete on cost, yield and manufacturability. As a result, the market should be modeled conservatively, rather than assuming a straight-line migration of all advanced packaging applications to hybrid bonding.

The industry is likely to become more system-level and ecosystem-driven. Leading suppliers are moving from standalone bonding tools toward integrated bonding

platforms combining surface activation, cleaning, metrology, alignment and bonding. Regional supply chains are also changing: Europe and Japan remain strong, while U.S. integrated platforms, Korean HBM equipment development and Chinese localization programs are reshaping the supply map. Strategic investments, co-development programs and customer-specific qualifications are becoming more important than simple equipment shipment announcements. Future competition will be determined by process yield, defectivity, overlay performance, warpage compensation, installed base service capability and the ability to co-optimize equipment with customer process flows. For new entrants, prototype shipment is only an early milestone; qualification at leading foundries, memory makers or advanced packaging lines will determine whether they can move from the extended longlist into the core formal supplier group.

This report studies the global Permanent Bonding Systems production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Permanent Bonding Systems total production and demand, 2021-2032, (Units)

Global Permanent Bonding Systems total production value, 2021-2032, (USD Million)

Global Permanent Bonding Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Permanent Bonding Systems consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Permanent Bonding Systems domestic production, consumption, key domestic manufacturers and share

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

Global Permanent Bonding Systems production by Bonding Technology, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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

This report profiles key players in the global Permanent Bonding Systems 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 (EVG), Tokyo Electron Limited (TEL), SUSS MicroTec, Canon Anelva, Nidec Machine Tool, Bondtech, ASMPT Ltd, Besi, Shibaura Mechatronics, Applied Materials, 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 Permanent Bonding Systems 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 Bonding Technology, 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 Permanent Bonding Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Permanent Bonding Systems Market, Segmentation by Bonding Technology:

Hybrid Bonding Equipment

Fusion Bonding Equipment

Surface Activated Bonding Equipment

Anodic Bonding Equipment

Global Permanent Bonding Systems Market, Segmentation by Bonding Flow:

Wafer-to-Wafer Permanent Bonding Systems

Die-to-Wafer / Chip-to-Wafer Hybrid Bonding Systems

Die-to-Die / Chip-to-Chip Bonding Systems

Global Permanent Bonding Systems Market, Segmentation by Wafer Size:

300 mm

200 mm

150 mm and Below

Global Permanent Bonding Systems Market, Segmentation by Application:

MEMS

CIS

HBM and Advanced Memory

AI/HPC Chiplets

RF Devices

Silicon Photonics and CPO

SOI & Engineered Substrate

Companies Profiled:

EV Group (EVG)

Tokyo Electron Limited (TEL)

SUSS MicroTec

Canon Anelva

Nidec Machine Tool

Bondtech

ASMPT Ltd

Besi

Shibaura Mechatronics

Applied Materials

iSABers Group

Wisdom SemiTec

Piotech, Inc

U-Precision Tech

NAURA Technology

Suzhou iWISEETEC

Applied Microengineering Ltd (AML)

Ayumi Industry

AMIES Technology

SET (Smart Equipment Technology)

Key Questions Answered:

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

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