

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

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Abstracts

The global TCB Bonder market size is expected to reach \$ 362 million by 2032, rising at a market growth of 14.2% CAGR during the forecast period (2026-2032).

Thermo Compression Attach. Using this technique, there are no adhesives to join the die and the package. Instead, heat and force are applied to the die in a process called 'Thermo Compression Bonding'. The bumps are forced against their opposing pads and a second metallic bond is formed where the bond comes into contact with the package metallization. This technique typically requires the use of heat as high as 350° to 400°C, and forces of as much as 100 g/bump.

The market size continues to expand, with the Asia-Pacific region leading the growth.

Drivers: The surge in demand for advanced packaging (such as 3D IC and Chiplet) in fields like 5G communication, high-performance computing (HPC), and automotive electronics is driving the growth in demand for bonding machines.

Technological Upgrades: Automation and high precision are becoming mainstream.

High-precision alignment: The accuracy of optical alignment systems has improved to $\pm 1\mu\text{m}$, meeting the requirements for tiny solder joints in advanced packaging.

Low-temperature bonding technology: Reduces thermal stress damage, suitable for sensitive devices like flexible electronics and MEMS.

Multi-material compatibility: Supports bonding of heterogeneous materials such as metals, ceramics, and polymers, expanding application scenarios.

Market Competition Landscape: High concentration, with accelerated domestic substitution.

Increased localization rate: Policy support combined with the expansion of local semiconductor production capacity (e.g., demand from SMIC and Tongfu Microelectronics) is driving the substitution of domestic equipment for imports.

Expansion of application areas: Advanced packaging and emerging demands.

Semiconductor packaging: Flip Chip, Wafer Level Packaging (WLP), and 3D IC integration have the highest demand for thermal compression bonding machines.

MEMS and sensors: The need for hermetic packaging is driving the application of bonding machines in automotive electronics and the Internet of Things.

Flexible electronics: The demand for low-temperature bonding technology is growing in the manufacturing of wearable devices and flexible screens.

Power devices: The packaging of silicon carbide (SiC) and gallium nitride (GaN) devices relies on high-reliability bonding processes.

The thermal compression bonding machine industry will exhibit characteristics of 'technological refinement, market regionalization, and competitive differentiation.' As the autonomy of China's semiconductor industry chain accelerates, domestic equipment is expected to achieve overtaking in niche areas (such as thermosonic bonding and flexible electronic packaging), while remaining vigilant about risks from international trade friction and supply chain fluctuations.

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

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

Highlights and key features of the study

Global TCB Bonder total production and demand, 2021-2032, (Units)
Global TCB Bonder total production value, 2021-2032, (USD Million)
Global TCB Bonder production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global TCB Bonder consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: TCB Bonder domestic production, consumption, key domestic manufacturers and share
Global TCB Bonder production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global TCB Bonder production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global TCB Bonder production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global TCB 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 ASMPT (Amicra), K&S, BESI, Shibaura, Hamni, SET, HANWHA, 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 TCB Bonder market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) 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 TCB Bonder Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global TCB Bonder Market, Segmentation by Type:

Automatic TCB Bonder

Manual TCB Bonder

Global TCB Bonder Market, Segmentation by Application:

IDMs

OSAT

Companies Profiled:

ASMPT (Amicra)

K&S

BESI

Shibaura

Hamni

SET

HANWHA

Key Questions Answered:

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

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