

Global Temporary Bonding and Debonding Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Temporary Bonding and Debonding Materials market size is expected to reach \$ 484 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

Temporary bonding and debonding materials are critical functional materials for advanced packaging, thin-wafer manufacturing, and heterogeneous integration processes. Their core function is to temporarily attach device wafers, panels, or brittle substrates to glass carriers, silicon carriers, or other rigid carriers during high-risk process steps such as wafer thinning, backside processing, redistribution layer formation, through-silicon via formation, fan-out packaging, three-dimensional stacking, and hybrid bonding, and then enable low-stress, low-residue, and low-damage separation after subsequent high-temperature, wet, dry, lithography, electroplating, cleaning, and handling processes are completed. These materials typically include liquid bonding adhesives, preformed adhesive films, thermal release tapes, laser release layers, photosensitive adhesive materials, thermal slide materials, temporary protective coatings, and compatible cleaning agents. Key technical priorities include bonding strength, thickness uniformity, total thickness variation control, thermal resistance, chemical resistance, clean debonding, low particle generation, and compatibility with equipment process windows. Typical customers include wafer foundries, advanced packaging houses, power semiconductor manufacturers, compound semiconductor manufacturers, MEMS manufacturers, and companies in the high-performance computing packaging supply chain.

Temporary bonding and debonding materials are becoming critical process materials that connect multiple stages of advanced packaging. As heterogeneous chip integration, fan-out packaging, through-silicon vias, three-dimensional stacking, and high-bandwidth

memory packaging continue to develop, wafers and panels face higher risks of breakage, warpage, contamination, and yield loss during thinning, transfer, backside processing, and repeated thermal and wet processes. These materials temporarily attach wafers to glass carriers, silicon carriers, or rigid substrates, providing mechanical support and process stability for ultra-thin wafers, and then enable low-damage separation through thermal, optical, mechanical, or chemical methods after subsequent processing. Their value is no longer limited to bonding strength, but extends to thermal process windows, chemical resistance, thickness uniformity, clean release, residue removal difficulty, and line-level compatibility. Material selection usually requires joint validation with bonding equipment, debonding equipment, carriers, cleaning systems, and customer process parameters, creating strong technical stickiness once qualified by high-end customers.

In terms of product structure, temporary bonding and debonding materials have developed into a competitive landscape with multiple material formats, multiple release mechanisms, and multiple application platforms. Liquid bonding adhesives are suitable for spin coating or slit coating and can be formulated to meet different requirements for thickness, leveling, thermal resistance, and peelability. Preformed adhesive films and thermal release tapes emphasize standardization, lamination efficiency, and stable release. Laser release layers and photothermal conversion release materials are better suited to glass carrier processes and high-end thin-wafer applications. Each debonding mechanism has its own boundary. Thermal slide supports controlled separation within a defined temperature window. Laser release enables localized energy input and carrier-side release. Mechanical peeling focuses on low-stress separation. Chemical dissolution emphasizes residue removal. UV weakening is suitable for selected tape and photosensitive material scenarios. Future competition will focus on high-temperature stability, low particle generation, low residue, low warpage, broad process compatibility, and customer-specific formulation capability.

From a regional and demand perspective, the United States, Japan, and China are important sources of supply for temporary bonding and debonding materials. U.S. companies have accumulated experience in temporary carrier support and adhesive film solutions for advanced packaging. Japanese companies have long-standing strengths in precision electronic materials, tapes, photolithography chemicals, and functional polymers. Chinese companies are accelerating their presence around advanced packaging localization, glass carrier processes, laser debonding, and high-temperature temporary adhesives. Demand is mainly driven by wafer foundries, assembly and test providers, power semiconductor manufacturers, compound semiconductor fabs, MEMS manufacturers, and high-performance computing supply

chains, and will grow with the expansion of AI chips, high-bandwidth memory, automotive-grade power devices, and advanced packaging capacity. In the short term, scale-up will remain relatively cautious due to customer qualification cycles, equipment coordination, and material reliability validation. In the medium to long term, increasing thin-wafer process complexity and advanced packaging capacity expansion will continue to raise the value contribution of these materials.

This report studies the global Temporary Bonding and Debonding Materials production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Temporary Bonding and Debonding Materials total production and demand, 2021-2032, (Tons)

Global Temporary Bonding and Debonding Materials total production value, 2021-2032, (USD Million)

Global Temporary Bonding and Debonding Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Temporary Bonding and Debonding Materials consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Temporary Bonding and Debonding Materials domestic production, consumption, key domestic manufacturers and share

Global Temporary Bonding and Debonding Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Temporary Bonding and Debonding Materials production by Delivery Form, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Temporary Bonding and Debonding Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Temporary Bonding and Debonding Materials 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 3M Company, Brewer Science, Inc., AI Technology, Inc., Micro Materials Inc., Sumitomo Bakelite Co., Ltd., Tokyo Ohka Kogyo Co., Ltd., Nitto Denko Corporation, Shin-Etsu Chemical Co., Ltd., Resonac Corporation, Toray Industries, Inc., 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 Temporary Bonding and Debonding Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Delivery Form, 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 Temporary Bonding and Debonding Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Temporary Bonding and Debonding Materials Market, Segmentation by Delivery

Form:

Liquid

Film

Tape

Global Temporary Bonding and Debonding Materials Market, Segmentation by
Debonding Mechanism:

Thermal Slide

Laser Release

Mechanical Peel

Chemical Dissolution

UV Weakening

Global Temporary Bonding and Debonding Materials Market, Segmentation by Release
Light Source:

Ultraviolet Laser

Visible Laser

Infrared Laser

Other

Global Temporary Bonding and Debonding Materials Market, Segmentation by
Application:

Wafer Thinning

Backside Processing

Redistribution Layer Formation

Other

Companies Profiled:

3M Company

Brewer Science, Inc.

AI Technology, Inc.

Micro Materials Inc.

Sumitomo Bakelite Co., Ltd.

Tokyo Ohka Kogyo Co., Ltd.

Nitto Denko Corporation

Shin-Etsu Chemical Co., Ltd.

Resonac Corporation

Toray Industries, Inc.

Daxin Materials Corp.

Shanghai PhiChem Material Co., Ltd.

Hubei Dinglong Holding Co., Ltd.

Shenzhen Samcien New Materials Technology Co., Ltd.

Key Questions Answered:

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

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