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Global Vacuum Heat Pressing Bonding Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Vacuum Heat Pressing Bonding Machine market size is expected to reach $ 1473 million by 2032, rising at a market growth of 11.1% CAGR during the forecast period (2026-2032).

Vacuum thermocompression bonders are high-precision semiconductor bonding systems that permanently join dies, wafers, substrates or panels under vacuum, inert atmosphere or controlled clean environments by precisely controlling temperature, pressure, alignment, bonding time and chamber conditions. These systems are used in advanced packaging, HBM, chiplets, 3D IC, MEMS, power devices, optoelectronics, silicon photonics, sensors and high-reliability electronic packaging. Their key value lies in achieving low voiding, low contamination, low warpage, high placement accuracy and reliable electrical, thermal and mechanical interconnects.

Vacuum thermocompression bonders should be defined as semiconductor advanced packaging and wafer-level bonding equipment operating under vacuum, inert atmosphere or controlled clean environments, rather than as ordinary vacuum hot presses, OCA laminators or microfluidic hot-press tools. These systems use precise control of temperature, force, alignment and bonding time to permanently join dies, wafers, substrates or panels. Key applications include HBM, AI accelerators, chiplets, 2.5D/3D packaging, MEMS, power devices, silicon photonics and optoelectronic packaging.

From the supply perspective, the global TCB equipment market remains led by overseas suppliers. ASMPT, Besi, K&S, Shibaura and SET are the core thermocompression bonding equipment suppliers. ASMPT, Besi and K&S are more closely associated with production TCB systems for advanced packaging; Shibaura and

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Toray have strong positions in panel-level, C2W and advanced package bonders; SET is representative in high-precision R&D and pilot-line bonding equipment. EVG and SUSS are more focused on wafer-level high-vacuum bonding, hybrid/fusion bonding and diffusion bonding systems. China and Taiwan-based suppliers are entering the market, with TorchSemi publicly listing the TCB350 and MSP+ launching a TCB/LAB bonder, but high-end HBM/AI production qualification, long-term tool stability and global service infrastructure remain key gaps.

Demand growth is driven by HBM capacity expansion, AI accelerator packaging, chiplet architectures, advanced packaging localization, high-reliability power device packaging, silicon photonics and MEMS wafer-level packaging. Customers do not evaluate these tools only by maximum temperature or pressure. The key purchasing criteria include post-bond alignment accuracy, UPH, low voiding, low contamination, low warpage, thermal uniformity, force uniformity, chamber cleanliness, process window and customer qualification capability. Future competition will increasingly shift from standalone tool capability toward integrated equipment-process-material-metrology-software control loops, especially for high-yield manufacturing in HBM, chiplet and hybrid-bonding-adjacent applications.

This report studies the global Vacuum Heat Pressing Bonding Machine production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study
Global Vacuum Heat Pressing Bonding Machine total production and demand, 2021-2032, (Units)
Global Vacuum Heat Pressing Bonding Machine total production value, 2021-2032, (USD Million)
Global Vacuum Heat Pressing Bonding Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Vacuum Heat Pressing Bonding Machine consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Vacuum Heat Pressing Bonding Machine domestic production,

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consumption, key domestic manufacturers and share
Global Vacuum Heat Pressing Bonding Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Vacuum Heat Pressing Bonding Machine production by Automation Level, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Vacuum Heat Pressing Bonding Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Vacuum Heat Pressing Bonding Machine 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 Ltd., BE Semiconductor Industries N.V., Kulicke & Soffa Industries, Inc., Shibaura Mechatronics Corporation, SET Corporation, EV Group, SUSS MicroTec SE, Toray Engineering Co., Ltd., Palomar Technologies, Micraft System Plus Co., Ltd., 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 Vacuum Heat Pressing Bonding Machine 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 Automation Level, 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 Vacuum Heat Pressing Bonding Machine Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Global Vacuum Heat Pressing Bonding Machine Market, Segmentation by Automation Level:

Fully Automated HVM Bonders

Semi-automatic Production Bonders

Global Vacuum Heat Pressing Bonding Machine Market, Segmentation by Vacuum / Atmosphere Capability:

High-vacuum Chamber Bonding

Medium / Low Vacuum Bonding

Inert Atmosphere Bonding

Local Vacuum / Vacuum Chuck Assisted Bonding

Forming Gas / Reducing Atmosphere Bonding

Global Vacuum Heat Pressing Bonding Machine Market, Segmentation by Bonding Process:

Micro-bump Thermocompression Bonding

Metal Diffusion Bonding

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Fluxless TCB

Adhesive / ACF / NCF Thermocompression

Hybrid-bonding Adjacent Thermal Assist

Hermetic / MEMS Vacuum Bonding

Global Vacuum Heat Pressing Bonding Machine Market, Segmentation by Application:

Semiconductors

Composite Materials

Carbide Industry

Functional Ceramics

Powder Metallurgy

Electronics and Electrical Appliances

Others

Companies Profiled:

ASMPT Ltd.

BE Semiconductor Industries N.V.

Kulicke & Soffa Industries, Inc.

Shibaura Mechatronics Corporation

SET Corporation

EV Group

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SUSS MicroTec SE

Toray Engineering Co., Ltd.

Palomar Technologies

Micraft System Plus Co., Ltd.

TorchSemi

Key Questions Answered:
1. How big is the global Vacuum Heat Pressing Bonding Machine market?
2. What is the demand of the global Vacuum Heat Pressing Bonding Machine market?
3. What is the year over year growth of the global Vacuum Heat Pressing Bonding Machine market?
4. What is the production and production value of the global Vacuum Heat Pressing Bonding Machine market?
5. Who are the key producers in the global Vacuum Heat Pressing Bonding Machine market?
6. What are the growth factors driving the market demand?

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