

Global TC and Hybrid Bonder for HBM Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global TC and Hybrid Bonder for HBM market size was valued at US\$ 221 million in 2025 and is forecast to a readjusted size of US\$ 664 million by 2032 with a CAGR of 17.7% during review period.

TCB (Through-the-Bolt) is an advanced packaging technology that achieves atomic-level connections between microbumps and intermediate dielectric layers by simultaneously applying heat (150-300?) and pressure (5-50kgf). Hybrid bonding, on the other hand, is a revolutionary bumpless bonding technology that achieves high-density interconnects between chips through simultaneous copper-copper (Cu-Cu) and oxide-oxide (SiO?-SiO?) bonding on the chip surface.

TIB, with its maturity and cost advantages, will continue to serve low- to mid-layer HBMs; while hybrid bonding, with its performance breakthroughs, is becoming the inevitable choice for high-layer HBMs (16+ layers).

In 2024, the average price of TC bonding machines for HBM was approximately US\$1.2 million per unit, with total sales of 152 units and an overall gross margin of around 45%. Hybrid bonding equipment for HBM has not yet been used in large quantities, and various OEM equipment manufacturers expect to ship it by the end of 2025.

This report is a detailed and comprehensive analysis for global TC and Hybrid Bonder for HBM market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets.

Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global TC and Hybrid Bonder for HBM market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global TC and Hybrid Bonder for HBM market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global TC and Hybrid Bonder for HBM market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global TC and Hybrid Bonder for HBM market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for TC and Hybrid Bonder for HBM
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global TC and Hybrid Bonder for HBM market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include HANMI Semiconductor, ASMPT, SEMES, Hanwha Semitech Co., Ltd, Yamaha Robotics (SHINKAWA), Besi, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

TC and Hybrid Bonder for HBM market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and

forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

TC Bonder for HBM

Hybrid Bonder for HBM

Market segment by Application

Below HBM2E

HBM3/3E

HBM4

Others

Major players covered

HANMI Semiconductor

ASMPT

SEMES

Hanwha Semitech Co., Ltd

Yamaha Robotics (SHINKAWA)

Besi

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe TC and Hybrid Bonder for HBM product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of TC and Hybrid Bonder for HBM, with price, sales quantity, revenue, and global market share of TC and Hybrid Bonder for HBM from 2021 to 2026.

Chapter 3, the TC and Hybrid Bonder for HBM competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the TC and Hybrid Bonder for HBM breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and TC and Hybrid Bonder for HBM market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of TC and Hybrid Bonder for HBM.

Chapter 14 and 15, to describe TC and Hybrid Bonder for HBM sales channel, distributors, customers, research findings and conclusion.

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