

# Global Advanced Bonding Equipment Market Growth 2026-2032

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## Abstracts

The global Advanced Bonding Equipment market size is predicted to grow from US\$ 944 million in 2025 to US\$ 1638 million in 2032; it is expected to grow at a CAGR of 7.7% from 2026 to 2032.

Advanced Bonding Equipment should be defined as the set of core process tools used to create high-precision, high-cleanliness, and high-reliability bonded interfaces across wafer-to-wafer (W2W), die-to-wafer (D2W/C2W), and chip-to-chip (C2C) structures, mainly for heterogeneous integration, 3D stacking, ultra-fine-pitch interconnects, ultra-thin wafer support, hermetic/vacuum packaging, and low-temperature or room-temperature material integration. The scope should include two major categories: wafer bonding equipment, covering permanent bonding, direct/fusion bonding, hybrid bonding, room-temperature/surface-activated bonding, anodic bonding, wafer-level thermo-compression/metal diffusion bonding, and temporary bonding/debonding; and advanced chip bonding equipment, but only when the tools are explicitly designed for hybrid bonding, direct bonding, or thermo-compression bonding (TCB) in high-density interconnect applications. By contrast, conventional die bonders, wire bonders, and standard flip-chip bonders should be excluded because they are primarily general assembly, wire interconnect, or standard packaging placement tools rather than advanced bond-interface formation platforms.

In practical industry terms, advanced bonding equipment has evolved from a market once centered on MEMS, CIS, engineered substrates, and wafer-level packaging into a strategic equipment segment increasingly driven by advanced packaging, HBM, chiplets, 2.5D/3D integration, AI, and HPC. The clearest technology trajectory today is that W2W hybrid bonding has already developed a relatively solid foundation in applications such as CIS and NAND, while D2W/C2W hybrid bonding is accelerating

with chiplet and HBM demand; temporary bonding/debonding has become a key enabler for wafer thinning and stacked-device manufacturing; and equipment platforms are moving toward more integrated, modular, and production-oriented architectures combining cleaning, activation, metrology, bonding, and debonding. SUSS explicitly positions TBDB as a core platform and hybrid bonding as a growth vector, while Applied Materials? Kinex integrates wet clean, plasma activation, degas, metrology, and bonding into a unified high-volume platform. Besi, ASMPT, Shibaura, and SET are also reinforcing their hybrid bonding and TCB portfolios.

The major growth drivers for advanced bonding equipment can be summarized into four dimensions. First, AI, HPC, HBM, and chiplet architectures are increasing demands for bandwidth density, interconnect density, and energy efficiency, accelerating the adoption of hybrid bonding and TCB. Second, ultra-thin wafer thinning, transport, and stacking are driving stronger demand for temporary bonding and debonding. Third, applications such as MEMS, CIS, engineered substrates, power devices, compound semiconductors, and III-V/optical devices continue to require lower thermal budgets, higher vacuum capability, lower particle levels, and broader material compatibility. Fourth, as advanced packaging faces simultaneous pressure on yield and cost, equipment competition is shifting toward overlay accuracy, cleanliness control, inline metrology, void/defect suppression, and overall cost-of-ownership optimization. As a result, advanced bonding equipment should be viewed not simply as a packaging sub-segment, but as a cross-domain strategic equipment category linking front-end material engineering, wafer processing, and advanced integration.

LP Information, Inc. (LPI) ' newest research report, the ?Advanced Bonding Equipment Industry Forecast? looks at past sales and reviews total world Advanced Bonding Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Advanced Bonding Equipment sales for 2026 through 2032. With Advanced Bonding Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Advanced Bonding Equipment industry.

This Insight Report provides a comprehensive analysis of the global Advanced Bonding Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Advanced Bonding Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Advanced Bonding Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Advanced Bonding Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Advanced Bonding Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Advanced Bonding Equipment market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Wafer Bonding Equipment

Chip Bonding Equipment

#### Segmentation by Degree of Automation:

Fully Automatic Bonding Equipment

Semi Automatic Bonding Equipment

#### Segmentation by Bonding Technology:

Permanent Bonding

Temporary Bonding/Debonding

#### Segmentation by Application:

Advanced Packaging & Heterogeneous Integration

MEMS/Sensor Packaging

CIS

RF / Photonics / Compound-Semiconductor Devices

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

EV Group

SUSS MicroTec

Tokyo Electron

Applied Microengineering Ltd (AML)

Nidec Machine Tool

Ayumi Industry

Shanghai Micro Electronics

U-Precision Tech

Hutem

Canon

Bondtech

TAZMO

Aimechatec

Besi

ASMPT Ltd

Applied Materials

Shibaura Mechatronics

SET (Smart Equipment Technology)

Kostek Systems

Mycronic

Kulicke & Soffa

Saultech Technology

Skytech Group

BestBon Co., Ltd.

iSABers Group

Suzhou iWISEETEC

Piotech, Inc

Kingsemi

Wisdom Semiconductor Technology

Suzhou Maxwell Technologies

Qinghui Semiconductor

Sintaike Semiconductor Equipment (Shanghai) Co., Ltd.

Larcom Semiconductor Equipment (Shanghai) Co., Ltd.

Wushi Microelectronics (Suzhou) Co., Ltd.

Bio-Nano Semi-conductor Equipment (ZheJiang) Co.,Ltd

Haichuang Intelligent Equipment (Yantai) Co., Ltd.

Circuit Fabology Microelectronics Equipment

iSTAR

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Advanced Bonding Equipment market?

What factors are driving Advanced Bonding Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Advanced Bonding Equipment market opportunities vary by end market size?

How does Advanced Bonding Equipment break out by Type, by Application?

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