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Global Bonder Market Growth 2025-2031

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Abstracts

The global Bonder market size is predicted to grow from US$ 2760 million in 2025 to US$ 3705 million in 2031; it is expected to grow at a CAGR of 5.0% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

Wire Bonder, Die Bonder, and FC Bonder are specialized types of bonding machines used in the semiconductor industry for the assembly of integrated circuits (ICs) and other electronic components. Each serves a specific purpose in the manufacturing process:

Wire Bonder:

A wire bonder is a machine used to create wire bonds, which are electrical connections between the leads of a semiconductor device and the conductive pads on the die. This process is critical in packaging semiconductor devices. The wire bonder uses a fine wire (often gold or aluminum) to form a connection by creating a ball or wedge at the end of the wire, which is then pressed onto the pad on the die. There are two primary types of wire bonding:

Ball Bonder: This machine forms a ball at the end of the wire and uses it to make the first bond (the ball bond) on the die pad. The wire is then stretched to the lead and another bond (the stitch bond) is formed.

Wedge Bonder: This machine uses a wedge-shaped tool to bond the wire to the die pad and the lead.

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Die Bonder:

A die bonder is a machine that attaches semiconductor dice (the individual chips or integrated circuits) to their packages. This is typically done using an adhesive, solder, or eutectic bonding. The die bonder positions the die with precision and applies the necessary force and heat to create a secure bond between the die and the package substrate. This process is essential for ensuring the mechanical and electrical integrity of the final semiconductor device.

FC Bonder (Flip Chip Bonder):

FC bonding, also known as flip chip bonding, is a technique where the die is mounted face-down onto a substrate, with the bond pads on the die's active surface directly connecting to the pads on the substrate. An FC bonder is designed to perform this process. The bonder can use various methods to attach the die, including soldering, conductive adhesive, or ultrasonic bonding. Flip chip technology is often used in high-performance applications due to its smaller footprint and better heat dissipation.

All these bonding machines are precision instruments that must maintain tight tolerances to ensure the reliability and performance of the electronic components they are used to assemble. They are equipped with advanced vision systems and control software to achieve the high accuracy required for these delicate operations.

Market DriversSemiconductor

Industry Growth: Rapid development in areas such as 5G, AI, IoT, automotive electronics, etc. is driving the demand for advanced packaging technologies, which in turn is increasing the demand for bonding machines.

Advanced Packaging Technologies: Popularity of technologies such as wafer level packaging (WLP), 3D packaging, and heterogeneous integration is driving the demand for high-precision bonding machines.

MEMS and Sensor Applications: Widespread use of MEMS and sensors in consumer electronics, automotive, medical, and other fields has increased the demand for bonding machines.

Miniaturisation and high performance trends: electronic devices are developing towards smaller, lighter and higher performance, requiring more precise bonding technology.

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Emerging application fields: the development of emerging fields such as flexible electronics, wearable devices, AR/VR, etc. provides new growth points for the bonding machine market.

Market ChallengesHigh

Technical Threshold: The development and production of high-precision bonding machines requires a high level of technical accumulation, which restricts new entrants.

Cost pressure: High-end bonding machines are expensive, and small and medium-sized enterprises may face procurement pressure.

Supply Chain Risk: Uncertainty in the global supply chain may affect the production and delivery of bonding machines.

Market Trends

High Precision and Multifunctionality: As packaging technology becomes more complex, the market demand for high-precision and multifunctional bonding machines increases.

Automation and Intelligence: The application of automated bonding machines and intelligent production lines is gradually gaining popularity, improving production efficiency and consistency.

New bonding technologies: The development of new technologies such as laser bonding and low-temperature bonding has brought new opportunities to the bonding machine market.

Environmental protection and energy saving: the demand for environmentally friendly bonding machines and energy saving technologies is gradually increasing.

Regionalised production: In order to reduce supply chain risks, the production of bonding machines is gradually developing in the direction of regionalisation and localisation.

Regional Market Analysis

Asia-Pacific: The global centre of semiconductor and electronics manufacturing,

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especially China, South Korea, Japan and Taiwan, has the highest market demand.

North America: technological innovation and high-end manufacturing to drive market demand.

Europe: Strong demand in automotive and industrial electronics.

Other regions: the market is in the development stage with high potential.

Future OutlookWith

the continued development of semiconductor, MEMS, sensors and other fields, the bonding machine market will maintain rapid growth. High precision, automation, intelligence and the application of new bonding technology will become the main direction of future development.

Bonding machine market prospects, technological progress and industry demand is the main driving force. In the future, high precision, automation, intelligence and new bonding technology will become the mainstream of the market.

LP Information, Inc. (LPI) ' newest research report, the “Bonder Industry Forecast” looks at past sales and reviews total world Bonder sales in 2024, providing a comprehensive analysis by region and market sector of projected Bonder sales for 2025 through 2031. With Bonder sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Bonder industry.

This Insight Report provides a comprehensive analysis of the global Bonder 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 Bonder portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Bonder market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bonder 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 Bonder.

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

Segmentation by Type:

- Wire Bonder
- Die Bonder
- FC Bonder

Segmentation by Application:

- Integrated device manufacturer (IDMs)
- Outsourced semiconductor assembly and test (OSATs)

This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan

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- 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.

- Besi

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ASMPT Ltd

Kulicke & Soffa

Shibaura

Shinkawa Ltd.

Fasford Technology

SUSS MicroTec

Hanmi

Palomar Technologies

Panasonic

Toray Engineering

Ultrasonic Engineering

Hesse GmbH

SET

F&K Delvotec

WestBond, Inc.

Hybond

DIAS Automation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Bonder market?
What factors are driving Bonder market growth, globally and by region?

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Which technologies are poised for the fastest growth by market and region?
How do Bonder market opportunities vary by end market size?
How does Bonder break out by Type, by Application?

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