

Global HBM Memory Thermal Compression Bonding Equipment Market Growth 2026-2032

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Abstracts

The global HBM Memory Thermal Compression Bonding Equipment market size is predicted to grow from US\$ 665 million in 2025 to US\$ 3131 million in 2032; it is expected to grow at a CAGR of 24.9% from 2026 to 2032.

In 2025, global HBM Memory Thermal Compression Bonding Equipment production reached approximately 378 units, with an average global market price of around US\$1,800,000 per unit.

The gross profit margin of major companies in the industry is between 35%-58%.

In 2025, the global production capacity of HBM Memory Thermal Compression Bonding Equipment was approximately 504 units.

HBM Memory Thermal Compression Bonding Equipment is advanced packaging equipment used to stack and bond high-bandwidth memory dies through precise alignment, heat, pressure, and micro-bump interconnection. It supports high placement accuracy, bonding force control, temperature uniformity, throughput stability, and process reliability for memory stacks used in artificial intelligence accelerators and advanced semiconductor packages.

The industrial chain of HBM Memory Thermal Compression Bonding Equipment covers upstream components such as precision stages, bonding heads, heaters, vision systems, force sensors, motion controllers, vacuum systems, software, and cleanroom modules. The midstream consists of equipment design, precision assembly, thermal control integration, alignment calibration, process recipe development, reliability testing, and customer validation. Downstream applications mainly include high-bandwidth

memory packaging, advanced logic-memory integration, chiplet packaging, artificial intelligence accelerators, data center processors, and high-end semiconductor assembly lines.

United States market for HBM Memory Thermal Compression Bonding Equipment is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for HBM Memory Thermal Compression Bonding Equipment is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for HBM Memory Thermal Compression Bonding Equipment is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key HBM Memory Thermal Compression Bonding Equipment players cover HANMI Semiconductor, ASMPT, BE Semiconductor Industries, Kulicke & Soffa, SEMES, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

This Insight Report provides a comprehensive analysis of the global HBM Memory Thermal Compression 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 HBM Memory Thermal Compression Bonding Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global HBM Memory Thermal Compression Bonding Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HBM Memory Thermal Compression 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 HBM Memory Thermal Compression Bonding Equipment.

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

Segmentation by Type:

- Die-to-Wafer Bonding Equipment

- Wafer-to-Wafer Bonding Equipment

- Chip-to-Substrate Bonding Equipment

Segmentation by System Configuration:

- Single-Head Bonding Equipment

- Multi-Head Bonding Equipment

- Fully Automatic Bonding Line

Segmentation by Placement Accuracy:

- Standard Accuracy (>3?m)

- High Accuracy (>1?3?m)

- Ultra-High Accuracy (>>1?m)

Segmentation by Application:

- AI Accelerator Packaging
- High-Performance Computing Chips
- Advanced Memory Packaging
- Other

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.

HANMI Semiconductor

ASMPT

BE Semiconductor Industries

Kulicke & Soffa

SEMES

Toray Engineering

Shinkawa

Shibaura Mechatronics

Smart Equipment Technology

Hanwha Semitech

Pulinx Intelligent

U-Precision Tech

Maxwell Technologies

Micraft System Plus

Key Questions Addressed in this Report

What is the 10-year outlook for the global HBM Memory Thermal Compression Bonding Equipment market?

What factors are driving HBM Memory Thermal Compression Bonding Equipment market growth, globally and by region?

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

How do HBM Memory Thermal Compression Bonding Equipment market opportunities vary by end market size?

How does HBM Memory Thermal Compression Bonding Equipment break out by Type, by Application?

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