

Global HBM Thermal Compression Bonding Equipment Market Growth 2026-2032

<https://marketpublishers.com/r/G05357711AD2EN.html>

Date: July 2026

Pages: 118

Price: US\$ 3,660.00 (Single User License)

ID: G05357711AD2EN

Abstracts

The global HBM Thermal Compression Bonding Equipment market size is predicted to grow from US\$ 959 million in 2025 to US\$ 4666 million in 2032; it is expected to grow at a CAGR of 25.5% from 2026 to 2032.

In 2025, global HBM Thermal Compression Bonding Equipment production reached approximately 306 units, with an average global market price of around USD 3,200,000 per unit.

The gross profit margin of major companies in the industry is between 32.48%?56.72%.

In 2025, the global production capacity of HBM Thermal Compression Bonding Equipment was approximately 403 units.

HBM Thermal Compression Bonding Equipment is advanced semiconductor packaging equipment used to bond stacked high-bandwidth memory dies through controlled heat, pressure and alignment. It supports fine-pitch micro-bump bonding, hybrid bonding preparation or thermocompression processes required for high-density memory stacks and advanced AI chips. The equipment requires high placement accuracy, temperature uniformity, force control, clean process environment and high throughput. The market includes thermocompression bonders and related bonding systems for HBM packaging, but excludes general wire bonders, flip-chip bonders for standard packages and finished HBM products.

The industry chain includes precision stages, bonding heads, heaters, force sensors, vision systems, alignment modules, vacuum chucks, control software, cleanroom components and metrology tools. Midstream production covers mechanical design,

thermal control, motion calibration, vision alignment, software integration, process qualification, reliability testing and installation services. Downstream demand comes from advanced packaging lines, memory packaging, AI chip production, foundry packaging services and outsourced assembly facilities. Growth is driven by HBM capacity expansion, AI accelerator demand, advanced packaging adoption and finer interconnect requirements.

United States market for HBM 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 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 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 Thermal Compression Bonding Equipment players cover HANMI Semiconductor, ASMPT, Besi, Kulicke & Soffa Industries, Hanwha Semitech, 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 Thermal Compression Bonding Equipment Industry Forecast" looks at past sales and reviews total world HBM Thermal Compression Bonding Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected HBM Thermal Compression Bonding Equipment sales for 2026 through 2032. With HBM 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 Thermal Compression Bonding Equipment industry.

This Insight Report provides a comprehensive analysis of the global HBM 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 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 Thermal Compression Bonding Equipment market.

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

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

Segmentation by Type:

- Chip-to-Wafer TCB Equipment

- Chip-to-Substrate TCB Equipment

- Die-to-Die TCB Equipment

Segmentation by Equipment Configuration:

- Single-Head TCB Equipment

- Multi-Head TCB Equipment

- Cluster TCB Equipment

Segmentation by Placement Accuracy:

- Standard Accuracy??3 ?m?

- High Accuracy??1.5 ?m?

Ultra-High Accuracy??1 ?m?

Segmentation by Application:

HBM Packaging

2.5D Advanced Packaging

3D IC 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

Besi

Kulicke & Soffa Industries

Hanwha Semitech

SEMES

Toray Engineering

Shibaura Mechatronics

Yamaha Robotics

PrecisioNext Intelligent Technology

Micraft System Plus

Suzhou Maxwell Technologies

Key Questions Addressed in this Report

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

What factors are driving HBM 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 Thermal Compression Bonding Equipment market opportunities vary by end market size?

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

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