

# Global TC and Hybrid Bonder for HBM Market Growth 2026-2032

<https://marketpublishers.com/r/G9A6A1811C32EN.html>

Date: January 2026

Pages: 88

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

ID: G9A6A1811C32EN

## Abstracts

The global TC and Hybrid Bonder for HBM market size is predicted to grow from US\$ 210 million in 2025 to US\$ 667 million in 2032; it is expected to grow at a CAGR of 18.8% from 2026 to 2032.

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.

United States market for TC and Hybrid Bonder for HBM 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 TC and Hybrid Bonder for HBM 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 TC and Hybrid Bonder for HBM is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key TC and Hybrid Bonder for HBM players cover HANMI Semiconductor, ASMPT, SEMES, Hanwha Semitech Co., Ltd, Yamaha Robotics (SHINKAWA), 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 "TC and Hybrid Bonder for HBM Industry Forecast" looks at past sales and reviews total world TC and Hybrid Bonder for HBM sales in 2025, providing a comprehensive analysis by region and market sector of projected TC and Hybrid Bonder for HBM sales for 2026 through 2032. With TC and Hybrid Bonder for HBM sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world TC and Hybrid Bonder for HBM industry.

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

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

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

Segmentation by Type:

TC Bonder for HBM

## Hybrid Bonder for HBM

### Segmentation by Application:

Below HBM2E

HBM3/3E

HBM4

Others

### 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

SEMES

Hanwha Semitech Co., Ltd

Yamaha Robotics (SHINKAWA)

Besi

### Key Questions Addressed in this Report

What is the 10-year outlook for the global TC and Hybrid Bonder for HBM market?

What factors are driving TC and Hybrid Bonder for HBM market growth, globally and by region?

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

How do TC and Hybrid Bonder for HBM market opportunities vary by end market size?

How does TC and Hybrid Bonder for HBM break out by Type, by Application?

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