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Global Vacuum Heat Pressing Bonding Machine Market Growth 2026-2032

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Abstracts

The global Vacuum Heat Pressing Bonding Machine market size is predicted to grow from US$ 670 million in 2025 to US$ 1454 million in 2032; it is expected to grow at a CAGR of 11.8% from 2026 to 2032.

Vacuum thermocompression bonders are high-precision semiconductor bonding systems that permanently join dies, wafers, substrates or panels under vacuum, inert atmosphere or controlled clean environments by precisely controlling temperature, pressure, alignment, bonding time and chamber conditions. These systems are used in advanced packaging, HBM, chiplets, 3D IC, MEMS, power devices, optoelectronics, silicon photonics, sensors and high-reliability electronic packaging. Their key value lies in achieving low voiding, low contamination, low warpage, high placement accuracy and reliable electrical, thermal and mechanical interconnects.

Vacuum thermocompression bonders should be defined as semiconductor advanced packaging and wafer-level bonding equipment operating under vacuum, inert atmosphere or controlled clean environments, rather than as ordinary vacuum hot presses, OCA laminators or microfluidic hot-press tools. These systems use precise control of temperature, force, alignment and bonding time to permanently join dies, wafers, substrates or panels. Key applications include HBM, AI accelerators, chiplets, 2.5D/3D packaging, MEMS, power devices, silicon photonics and optoelectronic packaging.

From the supply perspective, the global TCB equipment market remains led by overseas suppliers. ASMPT, Besi, K&S, Shibaura and SET are the core thermocompression bonding equipment suppliers. ASMPT, Besi and K&S are more closely associated with production TCB systems for advanced packaging; Shibaura and

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Toray have strong positions in panel-level, C2W and advanced package bonders; SET is representative in high-precision R&D and pilot-line bonding equipment. EVG and SUSS are more focused on wafer-level high-vacuum bonding, hybrid/fusion bonding and diffusion bonding systems. China and Taiwan-based suppliers are entering the market, with TorchSemi publicly listing the TCB350 and MSP+ launching a TCB/LAB bonder, but high-end HBM/AI production qualification, long-term tool stability and global service infrastructure remain key gaps.

Demand growth is driven by HBM capacity expansion, AI accelerator packaging, chiplet architectures, advanced packaging localization, high-reliability power device packaging, silicon photonics and MEMS wafer-level packaging. Customers do not evaluate these tools only by maximum temperature or pressure. The key purchasing criteria include post-bond alignment accuracy, UPH, low voiding, low contamination, low warpage, thermal uniformity, force uniformity, chamber cleanliness, process window and customer qualification capability. Future competition will increasingly shift from standalone tool capability toward integrated equipment-process-material-metrology-software control loops, especially for high-yield manufacturing in HBM, chiplet and hybrid-bonding-adjacent applications.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Vacuum Heat Pressing Bonding Machine and breaks

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down the forecast by Automation Level, 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 Vacuum Heat Pressing Bonding Machine.

This report presents a comprehensive overview, market shares, and growth opportunities of Vacuum Heat Pressing Bonding Machine market by product type, application, key manufacturers and key regions and countries.

Segmentation by Automation Level:

Fully Automated HVM Bonders

Semi-automatic Production Bonders

Segmentation by Vacuum / Atmosphere Capability:

High-vacuum Chamber Bonding

Medium / Low Vacuum Bonding

Inert Atmosphere Bonding

Local Vacuum / Vacuum Chuck Assisted Bonding

Forming Gas / Reducing Atmosphere Bonding

Segmentation by Bonding Process:

Micro-bump Thermocompression Bonding

Metal Diffusion Bonding

Fluxless TCB

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Adhesive / ACF / NCF Thermocompression

Hybrid-bonding Adjacent Thermal Assist

Hermetic / MEMS Vacuum Bonding

Segmentation by Application:

Semiconductors

Composite Materials

Carbide Industry

Functional Ceramics

Powder Metallurgy

Electronics and Electrical Appliances

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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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

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market penetration.

ASMPT Ltd.

BE Semiconductor Industries N.V.

Kulicke & Soffa Industries, Inc.

Shibaura Mechatronics Corporation

SET Corporation

EV Group

SUSS MicroTec SE

Toray Engineering Co., Ltd.

Palomar Technologies

Micraft System Plus Co., Ltd.

TorchSemi

Key Questions Addressed in this Report

What is the 10-year outlook for the global Vacuum Heat Pressing Bonding Machine market?

What factors are driving Vacuum Heat Pressing Bonding Machine market growth, globally and by region?

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

How do Vacuum Heat Pressing Bonding Machine market opportunities vary by end market size?

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How does Vacuum Heat Pressing Bonding Machine break out by Automation Level, by Application?

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