

South America Semiconductor Bonding Market Forecast to 2028 - COVID-19 Impact and Regional Analysis by Type (Die Bonder, Wafer Bonder, and Flip Chip Bonder) and Application (RF Devices, MEMS and Sensors, LED, CMOS Image Sensors, and 3D NAND)

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Report description:

The semiconductor bonding market in South America is expected to grow from US\$ 16.23 million in 2022 to US\$ 18.82 million by 2028. It is estimated to grow at a CAGR of 2.5% from 2022 to 2028.

Rising Demand for Hybrid Bonding

The growing need for I/O density and faster connections between chips is transforming system designs that include 3D architectures and hybrid bonding. Hybrid bonding connects power and signal-carrying copper pads and the surrounding dielectric through die-to-wafer or wafer-to-wafer connections, providing up to 1,000X more connections than copper microbumps. While accelerating bump density by three orders of magnitude above 2.5D integration techniques, it reduces signal delay to approximately nonexistent levels. Hybrid bonding is currently only used in a few high-end applications, such as processor/cache and HBM (High Bandwidth Memory), but it is expected that its adoption will increase in 3D DRAM, RF modems, and GaN/Si bonding for microLEDs. Hybrid bonding presents a practical alternative to transistor node scaling, where high performance is required. Thus, to meet the enormous demand from high-end processors, HBM, microLED, and other applications, hybrid bonding will create a lucrative opportunity for the growth of the South America semiconductor bonding market during the forecast period. Moreover, various market players are forming joint ventures and agreements to cater to the growing demand for hybrid bonding. Thus, various collaborative approaches by the market players in bringing forward the hybrid bonding technology will further lead to the growth of the South America semiconductor bonding market during the forecast period.

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Market Overview

Brazil, Argentina, and the Rest of South America are the key contributors to the semiconductor bonding market in the South America. The increasing demand for CMOS image sensors in machine vision systems is driving the need for semiconductor bonding equipment. The market growth is attributed to the growing demand for high-quality cameras in smartphones and tablets and the increasing application of image sensors in the medical diagnostic & image sensor, automotive, and other sectors. However, the complex manufacturing process of high-resolution image sensors and higher power consumption in CCD image sensors are hindering the growth of the South America semiconductor bonding market. The upcoming developments in the end user industries such as aerospace & defense, consumer electronics, healthcare, automotive, and telecommunications are boosting the market growth in the region. For instance, the future of the automotive industry in Brazil looks promising due to the growing demand for electric vehicles (EVs), passenger cars, and commercial vehicles; increasing electronic content per vehicle; increasing vehicle production; and increasing demand for advanced vehicle safety and comfort systems. A few leading trends supporting the growth of the automotive industry in Brazil include the development of smaller single chips for radar sensors and the introduction of high-efficiency power semiconductors.

South America Semiconductor Bonding Market Revenue and Forecast to 2028 (US\$ Million)

South America Semiconductor Bonding Market Segmentation

The South America semiconductor bonding market is segmented into type, application, and country.

Based on type, the market is segmented into die bonder, wafer bonder, and flip chip bonder. The wafer bonder segment registered the largest market share in 2022.

Based on application, the market is segmented into RF devices, MEMS and sensors, LED, CMOS image sensors, and 3D NAND. The MEMS and sensors segment held the largest market share in 2022.

Based on country, the market is segmented into Brazil, Argentina, and the Rest of South America. Brazil dominated the market share in 2022.

ASMPT; EV Group; Kulicke & Soffa Industries, Inc.; Palomar Technologies; Panasonic Corporation; Toray Industries Inc; WestBond, Inc.; and Yamaha Motor Corporation are the leading companies operating in the semiconductor bonding market in the South America region.

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