The Global Market for Polymeric Materials for Advanced Electronic Packaging 2026-2036

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Abstracts

The polymeric materials market for advanced electronic packaging has emerged as a critical enabler of next-generation semiconductor technologies, reaching >$1.5 billion in revenue in 2024 projected to grow at a compound annual growth rate (CAGR) of >13% to 2036. This rapid expansion reflects the semiconductor industry's fundamental shift toward advanced packaging architectures driven by the physical limitations of traditional transistor scaling and the insatiable demand for higher performance, greater functionality, and improved energy efficiency. The market's growth is propelled by several transformative semiconductor megatrends, including high-performance computing (HPC), generative AI, automotive ADAS systems, 5G/6G communications, AR/VR applications, and edge AI deployment. These applications demand packaging solutions that can accommodate larger dies, support chiplet integration, enable heterogeneous integration of diverse semiconductor technologies, and deliver superior thermal management—all requirements that place unprecedented demands on polymeric materials.

As transistor scaling reaches its physical limits, the industry has pivoted to advanced packaging as the primary path for continued performance improvements. This transition has elevated polymeric materials from simple encapsulation functions to sophisticated engineered materials that must simultaneously address mechanical stress management, electrical signal integrity, thermal dissipation, dimensional stability, and long-term reliability challenges.

The market encompasses four primary material categories: dielectric materials, mold compounds, underfills, and temporary bonding/debonding (TBDB) materials. Dielectric materials, including polyimides (PI), polybenzoxazole (PBO), benzocyclobutene (BCB), and epoxy-acrylic composites, serve as critical insulation layers in redistribution layer

(RDL) structures, enabling fine-pitch interconnects with low electrical loss. Mold compounds provide mechanical protection and thermal management, with increasing emphasis on high thermal conductivity formulations for AI and HPC applications. Underfill materials—available as capillary underfills (CUF), molded underfills (MUF), non-conductive films (NCF), and non-conductive pastes (NCP)—mitigate thermomechanical stress between chips and substrates. TBDB materials enable wafer thinning and backside processing essential for 3D integration and through-silicon via (TSV) formation.

Mobile and consumer electronics currently dominate market volumes and revenues, but telecom and infrastructure segments are experiencing the fastest growth, driven by hyperscale data center buildouts supporting AI workloads. Among packaging platforms, System-in-Package (SiP) remains the largest consumer of polymeric materials, while 2.5D and 3D packaging represent the fastest-growing segments with CAGRs exceeding 28-35%, reflecting the industry's embrace of chiplet architectures and heterogeneous integration for advanced processors. The polymeric materials supply chain exhibits significant concentration. Geographic concentration is even more pronounced.

The industry faces critical technical challenges, particularly coefficient of thermal expansion (CTE) mismatch between polymers and silicon, which drives warpage and reliability concerns in large, thin packages. Since polymers expand significantly more than silicon under thermal cycling, material developers are pursuing application-specific formulations that balance competing requirements: low CTE, high thermal conductivity, low dielectric constant, superior adhesion, fine-pitch patterning capability, and increasingly, PFAS-free compositions to meet evolving environmental regulations. The convergence of AI-driven computing demands, regulatory pressures for sustainable materials, and the technical complexity of 3D heterogeneous integration positions polymeric materials as indispensable enablers of semiconductor innovation through 2036 and beyond.

The Global Market for Polymeric Materials for Advanced Electronic Packaging 2026-2036 delivers in-depth analysis of the polymeric materials ecosystem, encompassing dielectric materials, molding compounds, underfill materials, and temporary bonding/debonding (TBDB) solutions that enable next-generation semiconductor packaging technologies.

As Moore's Law approaches physical limitations, the semiconductor industry has pivoted toward advanced packaging architectures including System-in-Package (SiP), Fan-Out Wafer Level Packaging (FOWLP), 2.5D packaging, 3D packaging, and chiplet

integration. These sophisticated packaging platforms demand increasingly specialized polymeric materials capable of meeting stringent requirements for thermal management, electrical performance, mechanical reliability, and dimensional stability. This report provides essential intelligence for materials suppliers, packaging manufacturers, semiconductor fabs, OSAT providers, equipment manufacturers, and strategic investors seeking to capitalize on this high-growth market opportunity.

The report delivers comprehensive market forecasts segmented by material category (dielectric, mold compound, underfill, TBDB), packaging platform (SiP, FOWLP, 2.5D, 3D, embedded die), end-market application (mobile & consumer electronics, HPC & AI, automotive & ADAS, telecom & infrastructure, IoT & edge computing, AR/VR), and geographic region spanning the decade from 2026 through 2036. Detailed revenue and volume projections enable stakeholders to identify the fastest-growing market segments, with particular emphasis on the explosive growth anticipated in 2.5D/3D packaging driven by artificial intelligence, high-performance computing, and generative AI applications.

Technology analysis examines the evolution of material chemistries including polyimides (PI), polybenzoxazole (PBO), benzocyclobutene (BCB), epoxy-based systems, and acrylic resin composites, evaluating critical performance parameters such as coefficient of thermal expansion (CTE), dielectric constant (Dk), dissipation factor (Df), glass transition temperature (Tg), thermal conductivity, and moisture absorption. The report explores emerging innovations in panel-level packaging, co-packaged optics (CPO), sustainable bio-based polymers, and AI-driven material design optimization.

Supply chain intelligence reveals the competitive landscape dominated by Japanese suppliers commanding approximately 80% market share, with detailed profiles of over 90 companies including material suppliers, packaging service providers, semiconductor manufacturers, and equipment vendors. Market share analysis identifies the top players across each material category, highlighting strategic positioning, technological capabilities, geographic presence, and competitive advantages. The report examines critical industry trends including PFAS-free material development, carbon emission reduction initiatives, recycled material integration, and regulatory compliance requirements.

Technical challenges and solutions address the industry's most pressing concerns: CTE mismatch and warpage control in large packages, moisture sensitivity and long-term reliability, high-temperature performance for automotive applications, fine-pitch interconnect capability for advanced nodes, process integration complexity, and cost

optimization strategies. Technology roadmaps project material evolution through 2036, identifying innovation opportunities and potential disruptive technologies.

Report Contents include:

- Market Analysis & Forecasts
  - Executive summary with context, market overview, and key drivers (2026-2036)
  - Global market size and growth projections with 13% CAGR analysis
  - Market forecasts by material category: dielectrics, mold compounds, underfills, TBDB materials
  - Market segmentation by end-market: Mobile/Consumer, HPC/AI, Automotive/ADAS, Telecom, IoT, AR/VR
  - Market analysis by packaging platform: SiP, FOWLP, 2.5D, 3D, Embedded Die
  - 2.5D/3D packaging growth trajectory showing 28-35% CAGR
  - Regional market distribution across Asia, Americas, and Europe
  - Price trend analysis and volume forecasts through 2036
- Material Technology Deep Dives
  - Dielectric materials: PI, PBO, BCB, epoxy-based, acrylic composites with suppliers and specifications
  - Molding compounds: EMC, MUF, liquid molding with thermal conductivity roadmaps
  - Underfill materials: CUF, MUF, NCF, NCP with fine-pitch and hybrid bonding capabilities
  - Temporary bonding/debonding: thermal slide, laser, chemical,

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mechanical, UV-release technologies

Material property comparisons: CTE, Dk, Df, Tg, thermal conductivity, moisture absorption

Deposition processes: spin-on, spray coating, lamination, compression molding, transfer molding

Advanced lithography capabilities and fine-pitch patterning (sub-2?m resolution)

Supply Chain & Competitive Intelligence

Polymeric materials ecosystem map with 50+ suppliers by category

Top 20 supplier rankings with market share analysis (2024-2036)

Geographic concentration analysis

Vertical integration analysis and manufacturing capacity assessments

Emerging Technologies & Applications

Panel-level packaging material requirements and cost benefits (510mm-600mm panels)

Co-packaged optics (CPO) with low-loss polymers for optical waveguides

Chiplet integration and heterogeneous integration material challenges

Advanced thermal management materials for AI/HPC applications

Sustainable and bio-based polymeric materials development

AI-driven material design and optimization methodologies

Next-generation material innovations and technology readiness levels

- Regulatory & Technical Challenges
  - PFAS-free material requirements and compliance timeline
  - CO? emission standards and sustainability initiatives
  - Recycled material integration strategies
  - Safety Data Sheet (SDS) compliance requirements
  - CTE mismatch and warpage control solutions for large packages
  - Moisture sensitivity and reliability standards (MSL ratings)
  - High-temperature performance requirements (>260°C) for automotive
  - Fine-pitch interconnect technology roadmap (bump pitch evolution)
  - Material characterization and industry standardization initiatives
  - Process integration challenges and cost optimization strategies
- Company Profiles (91 Companies)
  - Detailed profiles of material suppliers, OSAT providers, semiconductor manufacturers
  - Product portfolios, technological capabilities, and market positioning
  - Geographic presence and manufacturing facilities
  - Strategic initiatives, R&D investments, and recent developments
  - Contact information and corporate structure

This comprehensive report includes detailed profiles of 91 leading companies active in the polymeric materials ecosystem for advanced electronic packaging: 3M, AEMC, AI Technology, Ajinomoto, AMD, Amkor Technology, AOI Electronics, Applied Materials,

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Asahi Kasei, ASE, Brewer Science, Caplinq, Chang Chun Group, Chang Wah Electromaterials, CXMT, Darbond, Deca Technologies, DELO, Dupont, Empower Materials, Epoxy Technology, Eternal Materials, Everlight Chemical, Fujifilm, GlobalFoundries, HD Microsystems, Henkel, Huahai Chengke, Hysol, IBM, Imec, Innolux, Intel, JCET, JSR, Kayaku Advanced Materials, KCC, Kyocera, MacDermid Alpha, Manz, MASTERBOND, Merck, Micro Materials, Micron, Mingkun Technologies, Minseoa, Mitsubishi Gas Chemical, Mitsui Chemicals, Murata, Nagase ChemteX, Namics and more. These profiles encompass the complete value chain from raw material suppliers and specialty chemical manufacturers to advanced packaging service providers, leading semiconductor fabs, and equipment manufacturers driving innovation in polymeric materials for next-generation electronic packaging applications.

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Contents

1 EXECUTIVE SUMMARY

1.1 Context and Market Overview
1.2 Advanced Packaging Market Trends
1.3 Key Market Drivers
1.4 Market Forecast Summary
1.5 Competitive Landscape Overview

2 INTRODUCTION

2.1 Report Objectives
2.2 Scope of the Report
2.3 Methodologies and Definitions

3 POLYMERIC MATERIALS IN ADVANCED PACKAGING

3.1 Definition of Polymeric Materials
3.2 Polymeric Materials Categories in Advanced Packaging
3.3 Role of Polymers in Next-Generation Packaging
3.4 Overview of Materials Technology Trends
3.5 Material Requirements Evolution
3.6 Challenges of Soft Materials in Advanced Packaging

4 GLOBAL MARKET FORECAST

4.1 Global Market Size and Growth Projections (2026-2036)
4.2 Polymeric Materials Revenue by Material Category
4.3 2024 Market Share by Material and Package Types
4.4 Polymeric Materials Revenue and Volume Forecast
4.5 Market Forecast by End-Market
4.5.1 Mobile & Consumer Electronics
4.5.2 High-Performance Computing (HPC) and AI
4.5.3 Automotive and ADAS
4.5.4 Telecom and Infrastructure
4.5.5 IoT and Edge Computing
4.5.6 AR/VR Applications
4.6 Market Forecast by Packaging Platform

4.6.1 System-in-Package (SiP)
4.6.2 Fan-Out Wafer Level Packaging (FOWLP)
4.6.3 2.5D Packaging
4.6.4 3D Packaging and Chiplet Integration
4.6.5 Embedded Die Packaging
4.7 2.5D/3D Packaging Growth
4.8 Regional Market Analysis
4.9 Market Trends and Opportunities

5 POLYMERIC MATERIALS SUPPLY CHAIN FOR ADVANCED PACKAGING

5.1 Advanced Packaging Supply Chain Overview
5.2 Overview of Material Suppliers by Material Category
5.3 Supply Chain Analysis and Dynamics
5.4 Regulations for Polymeric Materials
5.4.1 PFAS-Free Requirements
5.4.2 CO? Emission Standards
5.4.3 Recycled Material Integration
5.4.4 Safety Data Sheet Compliance
5.4.5 AI Implementation in Material Development

6 DIRECT MATERIALS-DIELECTRIC MATERIALS

6.1 Definition and Overview of Dielectric Materials
6.2 Application of Dielectric Materials in Advanced Packaging
6.3 Polymeric Dielectric Material Market Trends
6.4 Material Segmentation and Deposition Processes
6.4.1 Polyimides (PI)
6.4.2 Polybenzoxazole (PBO)
6.4.3 Benzocyclobutene (BCB)
6.4.4 Epoxy-Based Dielectrics
6.4.5 Acrylic Resin Composites
6.5 Dielectric Material Requirements for Advanced Packaging
6.5.1 Electrical Properties (Low Dk, Low Df)
6.5.2 Thermal Stability
6.5.3 Mechanical Properties
6.5.4 CTE Control and Warpage Management
6.5.5 Adhesion and Patternability
6.6 Comparison Between Different Material Types

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6.7 Panel Level Packaging Material Trends
6.8 Advanced Lithography and Fine Pitch Capabilities
6.9 Dielectric Material Suppliers by Material Type
6.10 Technology Roadmap for Dielectric Materials
6.11 Dielectric Material Market Forecast (2026-2036)

7 DIRECT MATERIALS– MOLDING COMPOUNDS

7.1 Definition and Overview of Mold Compound Materials
7.2 Application of Mold Compounds in Advanced Packaging
7.3 Epoxy Mold Compound (EMC) Technology
7.4 Molded Underfill (MUF) vs. Traditional EMC
7.5 Material Segmentation and Deposition Processes
  7.5.1 Compression Molding
  7.5.2 Transfer Molding
  7.5.3 Liquid Molding
7.6 Mold Compound Requirements for Advanced Packaging
  7.6.1 Low Warpage and CTE Control
  7.6.2 High Thermal Conductivity
  7.6.3 Low Moisture Absorption
  7.6.4 Filler Size and Content Optimization
  7.6.5 High Reliability and Mechanical Strength
7.7 Mold Compound Processing Challenges
  7.7.1 Large Package Size Handling
  7.7.2 Thin Profile Requirements
  7.7.3 High-Temperature Applications
7.8 Innovations in Thermoplastic Polymers
7.9 Mold Compound Suppliers by Material Type
7.10 Technology Roadmap for Mold Compounds
7.11 Mold Compound Market Forecast (2026-2036)

8 DIRECT MATERIALS – UNDERFILL MATERIALS

8.1 Definition and Overview of Underfill Materials
8.2 Application of Underfill in Advanced Packaging
8.3 Material Segmentation and Processing
  8.3.1 Capillary Underfill (CUF)
  8.3.2 Molded Underfill (MUF)
  8.3.3 Non-Conductive Film (NCF)

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info@marketpublishers.com

8.3.4 Non-Conductive Paste (NCP)
8.4 Underfill Requirements for Advanced Packaging
8.4.1 Flow Characteristics and Void Control
8.4.2 CTE Matching and Stress Management
8.4.3 Fast Cure and High Throughput
8.4.4 Thermal and Electrical Performance
8.4.5 Reworkability Considerations
8.5 Fine Pitch and Micro-Bump Applications
8.6 Hybrid Bonding Compatible Underfills
8.7 Underfill Suppliers by Material Type
8.8 Technology Roadmap for Underfill Materials
8.9 Underfill Material Market Forecast (2026-2036)

9 INDIRECT MATERIALS – TEMPORARY BONDING/DEBONDING

9.1 Definition and Overview of TBDB Materials
9.2 Application of TBDB in Advanced Packaging
9.3 Material Segmentation and Application Formats
9.3.1 Adhesive-Based TBDB
9.3.2 Polymer-Based TBDB
9.3.3 Film-Based TBDB
9.4 Debonding Technologies and Process Flow
9.4.1 Thermal Slide Debonding
9.4.2 Laser Debonding
9.4.3 Chemical Debonding
9.4.4 Mechanical Debonding
9.4.5 UV-Release Technology
9.5 TBDB Material Requirements and Technology Trends
9.5.1 Bond Strength and Thermal Stability
9.5.2 Clean Debonding with Minimal Residue
9.5.3 Carrier Wafer Compatibility
9.5.4 Through-Silicon Via (TSV) Processing
9.6 Wafer Thinning and Ultra-Thin Wafer Handling
9.7 Panel Level Packaging TBDB Solutions
9.8 TBDB Material Suppliers by Technology
9.9 Technology Roadmap for TBDB Materials
9.10 TBDB Material Market Forecast (2026-2036)

10 EMERGING MATERIALS AND APPLICATIONS

10.1 Polymeric Materials in Panel-Level Packaging
10.1.1 Panel Size Scaling Challenges
10.1.2 Material Requirements for Large Panels
10.1.3 Cost Benefits and Manufacturing Efficiency
10.2 Polymeric Materials in Co-Packaged Optics (CPO)
10.2.1 Optical Material Requirements
10.2.2 Low-Loss Polymers for Waveguides
10.2.3 Integration with Silicon Photonics
10.3 Polymers for Chiplet Integration and Heterogeneous Integration
10.4 Advanced Thermal Management Materials
10.5 Sustainable and Bio-Based Polymeric Materials
10.6 Next-Generation Material Innovations
10.7 AI-Driven Material Design and Optimization

11 TECHNOLOGY CHALLENES AND FUTURE OUTLOOK

11.1 Key Technical Challenges
11.1.1 CTE Mismatch and Warpage Control
11.1.2 Moisture Sensitivity and Reliability
11.1.3 High-Temperature Performance
11.1.4 Fine Pitch and High-Density Interconnects
11.2 Material Characterization and Standardization
11.3 Process Integration Challenges
11.4 Cost and Supply Chain Considerations
11.5 Environmental and Regulatory Compliance
11.6 Future Trends and Opportunities
11.6.1 AI and HPC Driving Demand
11.6.2 5G/6G Communications Impact
11.6.3 Automotive Electronics Growth
11.7 Technology Roadmap 2026-2036

12 COMPANY PROFILES 256 (91 COMPANY PROFILES)

13 REFERENCES

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List Of Tables

LIST OF TABLES

Table 1. Advanced Packaging Market Trends.
Table 2. Market Size Overview - Polymeric Materials for Advanced Packaging (2024, 2030, 2036)
Table 3. CAGR by Material Category (2024-2036)
Table 4. Report Scope - Included vs. Excluded Applications
Table 5. Glossary of Key Terms and Abbreviations
Table 6. Material Categories and Subcategories Covered
Table 7. Polymeric Materials Categories in Advanced Packaging.
Table 8. Polymeric Materials Classification by Function
Table 9. Key Material Properties Comparison (CTE, Dk, Df, Tg, Thermal Conductivity)
Table 10. Material Requirements by Packaging Platform
Table 11. Evolution of Material Performance Requirements (2020 vs 2024 vs 2030)
Table 12. Polymeric Materials Requirements in Advanced Packaging
Table 13. Global Polymeric Materials Market Size by Material Type (2024-2036) - Revenue ($M)
Table 14. Global Polymeric Materials Market Size by Material Type (2024-2036) - Volume (Metric Tons)
Table 15. Market Share by Material Category (2024, 2030, 2036) - %
Table 16. Market Forecast by End-Market (2024-2036) - Revenue ($M)
Table 17. Market Forecast by End-Market (2024-2036) - Volume (Metric Tons)
Table 18. Market Share by End-Market (2024, 2030, 2036) - %
Table 19. Market Forecast by Packaging Platform (2024-2036) - Revenue ($M)
Table 20. Market Forecast by Packaging Platform (2024-2036) - Volume (Metric Tons)
Table 21. CAGR Analysis by Packaging Platform (2024-2030, 2030-2036)
Table 22. 2.5D/3D Packaging Growth Metrics and Drivers
Table 23. Regional Market Distribution (2024) - Asia, Americas, Europe
Table 24. Price Trends by Material Category (2024-2036) - $/kg
Table 25. PFAS Regulations Impact Timeline and Compliance Status
Table 26. Polymeric Dielectric Material Market Trends.
Table 27. Dielectric Material Types and Chemical Families
Table 28. Dielectric Constant (Dk) and Dissipation Factor (Df) by Material Type
Table 29. Dielectric Materials Performance Comparison Matrix
Table 30. Application Requirements by Packaging Type
Table 31. Deposition Methods Comparison (Spin-on, Spray, Lamination)
Table 32. Polyimide (PI) Types and Suppliers

Table 33. PBO Materials and Suppliers
Table 34. BCB Materials and Suppliers
Table 35. Photosensitive vs. Non-photosensitive Dielectrics Comparison
Table 36. Panel Level Packaging Dielectric Requirements
Table 37. Lithography Capability by Material Type (Resolution, Line/Space)
Table 38. Dielectric Market Forecast by Material Type (2024-2036) - Revenue ($M)
Table 39. Dielectric Market Forecast by Application (2024-2036)
Table 40. Price Analysis by Dielectric Type ($/kg)
Table 41. Dielectric Constant vs Frequency by Material Type
Table 42. Panel Level Packaging Dielectric Challenges
Table 43. Mold Compound Classification (EMC, MUF, Liquid MC)
Table 44. EMC vs MUF Performance Comparison
Table 45. Filler Types and Properties (SiO2, Al2O3, AlN, BN)
Table 46. Filler Size and Content by Application
Table 47. Thermal Conductivity Requirements by Package Type
Table 48. CTE Values by Mold Compound Type
Table 49. Molding Process Comparison (Compression, Transfer, Liquid)
Table 50. Mold Compound Requirements for HPC/AI Packages
Table 51. Warpage Control Strategies and Material Solutions
Table 52. Thermoplastic vs. Thermoset Molding Compounds
Table 53. Mold Compound Market Forecast by Type (2024-2036) - Revenue ($M)
Table 54. Mold Compound Market Forecast by Application (2024-2036)
Table 55. Price Trends by Mold Compound Type ($/kg)
Table 56. High Thermal Conductivity Mold Compounds Roadmap
Table 57. Underfill Types Classification and Applications
Table 58. CUF vs MUF vs NCF vs NCP Comparison Matrix
Table 59. Viscosity and Flow Characteristics by Underfill Type
Table 60. Cure Time and Temperature Requirements
Table 61. CTE Matching Analysis by Package Type
Table 62. Fine Pitch Capability by Underfill Type (Minimum Pitch)
Table 63. Hybrid Bonding Compatible Underfill Materials
Table 64. Reworkability Comparison
Table 65. Underfill Market Forecast by Type (2024-2036) - Revenue ($M)
Table 66. Underfill Market Forecast by Application (2024-2036)
Table 67. Underfill Supplier Market Share (2024, 2027, 2030, 2036)
Table 68. Price Analysis by Underfill Type ($/kg or $/unit)
Table 69. No-Flow Underfill (NFU) Technology Evolution
Table 70. Underfill Application Methods Comparison
Table 71. TBDB Technology Classification

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Table 72. Debonding Method Comparison (Thermal, Laser, Chemical, Mechanical, UV)
Table 73. Carrier Wafer Compatibility Matrix
Table 74. Bond Strength Requirements by Application
Table 75. Thermal Budget Comparison by TBDB Technology
Table 76. Residue and Contamination Levels Post-Debonding
Table 77. TSV Processing Compatibility
Table 78. Wafer Thickness Capability (Minimum Thickness Supported)
Table 79. Panel Level TBDB Solutions Comparison
Table 80. TBDB Market Forecast by Technology Type (2024-2036) - Revenue ($M)
Table 81. TBDB Market Forecast by Application (2024-2036)
Table 82. TBDB Supplier Market Share (2024, 2027, 2030, 2036)
Table 83. Cost per Wafer/Panel Analysis by TBDB Method
Table 84. Throughput Comparison by Debonding Technology
Table 85. Panel Level Packaging Material Requirements vs. Wafer Level
Table 86. Panel Size Roadmap and Material Implications
Table 87. CPO Material Requirements for Optical Applications
Table 88. Low-Loss Polymer Properties for Waveguides
Table 89. Chiplet Integration Material Challenges
Table 90. Thermal Interface Materials Comparison
Table 91. Bio-based and Sustainable Polymer Alternatives
Table 92. Emerging Material Technologies Readiness Level
Table 93. Key Technical Challenges Summary
Table 94. CTE Mismatch by Material-Substrate Combination
Table 95. Moisture Sensitivity Levels (MSL) Requirements
Table 96. High-Temperature Performance Requirements (>260°C)
Table 97. Fine Pitch Technology Roadmap (Bump Pitch Evolution)
Table 98. Industry Standardization Initiatives
Table 99. Cost Structure Analysis by Material Type
Table 100. Environmental Regulations Impact Assessment
Table 101. Polymeric Materials Ecosystem for Advanced Packaging - Companies by Category

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List Of Figures

LIST OF FIGURES

Figure 1. Polymer-based materials used in advanced packaging. (a) Overmolded flip chip package. (b) Lidded flip chip package.
Figure 2. Polymeric Materials Market (2024-2036)
Figure 3. Market Share by Material Category (2024).
Figure 4. CAGR by End-Market Segment.
Figure 5. Polymeric Materials Ecosystem for Advanced Packaging
Figure 6. Cross-section of Advanced Package Showing Material Locations
Figure 7. Semiconductor Packaging Evolution Timeline
Figure 8. 2024-2030 Polymeric Materials Revenue for Advanced Packaging
Figure 9. Market Forecast by Material Type (2024-2036)
Figure 10. Market Forecast by End-Market (2024-2036)
Figure 11. Market Forecast by Packaging Platform (2024-2036)
Figure 12. 2.5D/3D Packaging Growth Trajectory
Figure 13. Figure 4.6: HPC/AI Impact on Material Demand
Figure 14. Regional Market Share Evolution (2024 vs 2036)
Figure 15. Advanced Packaging Value Chain Overview
Figure 16. Dielectric Material Application in RDL Structures
Figure 17. Spin-on Dielectric Process Flow
Figure 18. Lithography Resolution Roadmap for Dielectrics
Figure 19. Molding Compound Application in Package Cross-section
Figure 20. Compression Molding Process Schematic
Figure 21. Hybrid Bonding with Underfill
Figure 22. Laser Debonding System Schematic
Figure 23. Panel Level Packaging Process Flow
Figure 24. Panel Size Roadmap (300mm wafer ? 510mm ? 600mm panels)
Figure 25. Co-Packaged Optics (CPO) Architecture
Figure 26. Chiplet Integration Material Challenges Map
Figure 27. Bio-based Polymer Development Timeline

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