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Global Advanced Packaging Underfill Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Advanced Packaging Underfill Material market size is expected to reach $ 962 million by 2032, rising at a market growth of 10.4% CAGR during the forecast period (2026-2032).

Advanced packaging underfill materials are polymeric encapsulants used to fill micro-gaps between die and substrate, die and interposer, or stacked dies. They improve package reliability by reducing thermo-mechanical stress on solder joints and micro-bumps and by suppressing interfacial cracking and moisture-related failure. Major formats include capillary, no-flow, molded and pre-applied underfills, with development focused on low viscosity, rapid low-temperature cure, void-free fine-pitch filling and low warpage. In 2025, global Advanced Packaging Underfill Material production reached approximately 13,400 tons.

Chiplet, 2.5D/3D and HBM architectures are increasing interconnect density and shrinking bump pitch, making underfill essential for micro-interconnect fatigue life and structural stability.

Thinner packages, larger dies and stronger CTE mismatch among package materials are driving continuous upgrades toward low-modulus, low-shrinkage, low-warpage formulations with strong interfacial adhesion.

Advanced packaging increasingly prioritizes shorter process cycles and higher yield, encouraging fast-cure, pre-applied and molded-underfill solutions that integrate closely with production equipment.

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Report Scope

This report studies the global Advanced Packaging Underfill Material production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Advanced Packaging Underfill Material and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Advanced Packaging Underfill Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Advanced Packaging Underfill Material total production and demand, 2021-2032, (Kilotons)

Global Advanced Packaging Underfill Material total production value, 2021-2032, (USD Million)

Global Advanced Packaging Underfill Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Advanced Packaging Underfill Material consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Advanced Packaging Underfill Material domestic production, consumption, key domestic manufacturers and share

Global Advanced Packaging Underfill Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Advanced Packaging Underfill Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Advanced Packaging Underfill Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

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This report profiles key players in the global Advanced Packaging Underfill Material market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel, Namics, Resonac, Nagase ChemteX, MacDermid Alpha, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Advanced Packaging Underfill Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Advanced Packaging Underfill Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global Advanced Packaging Underfill Material Market, Segmentation by Type:

Capillary Underfill

No-Flow Underfill

Molded Underfill

Pre-Applied Underfill

Global Advanced Packaging Underfill Material Market, Segmentation by Resin Chemistry:

Epoxy-Based

Acrylate-Based

Hybrid Resin

Global Advanced Packaging Underfill Material Market, Segmentation by Cure Temperature:

Below 130°C

130–170°C

Above 170°C

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Global Advanced Packaging Underfill Material Market, Segmentation by Application:

Flip-Chip Packaging

2.5D/3D Packaging

HBM And 3D Memory

Chiplet Packaging

Fan-Out Packaging

Other Advanced Packages

Companies Profiled:

Henkel

Namics

Resonac

Nagase ChemteX

MacDermid Alpha

Key Questions Answered

1. How big is the global Advanced Packaging Underfill Material market?
2. What is the demand of the global Advanced Packaging Underfill Material market?
3. What is the year over year growth of the global Advanced Packaging Underfill Material market?
4. What is the total value of the global Advanced Packaging Underfill Material market?
5. Who are the Major Players in the global Advanced Packaging Underfill Material market?

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6. What are the growth factors driving the market demand?

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