

Global CSP & BGA Board Level Underfills Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CSP & BGA Board Level Underfills market size is expected to reach \$ 810 million by 2032, rising at a market growth of 9.8% CAGR during the forecast period (2026-2032).

CSP/BGA Board Level Underfill is a polymer based insulating material used to fill, seal, and mechanically reinforce the solder interconnect gap beneath Chip Scale Package and Ball Grid Array devices after secondary assembly onto a motherboard. Mainstream commercial products are typically one component, heat curable formulations based on epoxy resin together with silica fillers, curing agents, and performance additives, and are commonly supplied as black or dark liquids. In practice, the material is dispensed along the edge of a package after reflow, then drawn into the narrow gap between the package and the substrate by capillary action. After cure, it forms a continuous support layer that reduces thermomechanical stress caused by coefficient of thermal expansion mismatch and improves reliability under thermal cycling, drop, shock, bending, vibration, and humid operating conditions. Major commercial categories include capillary flow underfills, edge bond underfills, corner bond underfills, and reworkable underfills. Key supply capability is concentrated in countries and regions with strong electronic materials and semiconductor packaging ecosystems, especially Japan, China, the United States, and Germany. Major applications include smartphones, wearables, automotive electronics, industrial control, communications equipment, servers, and other high reliability electronic assemblies.

Based on IPC's definition of board level underfill materials, official supplier product information, visible authorized distribution pricing, and the intensity of downstream advanced packaging demand, global CSP/BGA Board Level Underfill output in 2025 is estimated at approximately 1,500 to 2,600 tons, while mainstream ex factory pricing is

assessed at around USD 140 to 240 per kilogram, with high reliability, reworkable, and fine pitch specialty grades priced above that range.

As global electronics manufacturing continues to move toward higher density, smaller form factors, and stricter reliability requirements, CSP/BGA Board Level Underfill is evolving from a traditional assembly support material into a critical functional material that directly influences long term package reliability and overall system life. IPC makes clear that the core role of board level underfill materials is to enhance the reliability of second level solder interconnects. NAMICS directly defines CSP/BGA Board Level Underfill as a material used to fill and seal spaces by capillary action when packaged chips are secondarily mounted onto a motherboard, while Henkel positions its underfill portfolio around capillary flow, edge bond, and corner bond solutions for CSP, BGA, WLCSP, LGA, and similar devices. As end products continue to pursue higher I O density, thinner structures, and harsher service environments, the material value and process importance of CSP/BGA Board Level Underfill continue to rise.

On the demand side, AI servers and high performance computing are reinforcing growth in advanced packaging and high reliability interconnect materials, while automotive electronics are further expanding the use of high reliability board level underfills. TSMC highlighted strong AI related and advanced packaging demand in its 2024 annual reporting and January 2026 earnings discussion, Amkor reported record 2025 Advanced Packaging and Computing business performance, and Infineon stated in its 2025 annual report that semiconductor content per vehicle is expected to continue growing. This means the market is no longer driven only by shipment growth, but increasingly by demand for lower stress, lower ionic contamination, lower warpage, longer thermal cycle life, and better process compatibility. Consumer electronics should remain the shipment base, while automotive electronics, communications infrastructure, data centers, and industrial control are likely to become the main drivers of value growth. At the same time, the industry faces tighter process windows, longer qualification cycles, and stricter cost control, and material viscosity, wetting behavior, filler design, void control, cure profile, CTE, Tg, modulus, ionic cleanliness, and reworkability all directly affect production stability and final reliability. Suppliers that combine fast flow, short cure, lower temperature compatibility, strong thermal cycle performance, and robust local technical support are likely to strengthen their positions in the global high end electronic assembly materials market.

This report studies the global CSP & BGA Board Level Underfills production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CSP & BGA Board Level Underfills 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 CSP & BGA Board Level Underfills that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CSP & BGA Board Level Underfills total production and demand, 2021-2032, (Tons)

Global CSP & BGA Board Level Underfills total production value, 2021-2032, (USD Million)

Global CSP & BGA Board Level Underfills production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global CSP & BGA Board Level Underfills consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: CSP & BGA Board Level Underfills domestic production, consumption, key domestic manufacturers and share

Global CSP & BGA Board Level Underfills production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global CSP & BGA Board Level Underfills production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global CSP & BGA Board Level Underfills production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global CSP & BGA Board Level Underfills 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 Weldtone Technology Co., Ltd., Dover Chemical Electronic Materials Shanghai Co., Ltd., Henkel AG & Co. KGaA, NAMICS Corporation, Panasonic Industry Co., Ltd., Element Solutions Inc., Resonac Corporation, ThreeBond Co., Ltd., DELO Industrie Klebstoffe GmbH & Co. KGaA, Master Bond Inc., 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 CSP & BGA Board Level Underfills market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) 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 CSP & BGA Board Level Underfills Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global CSP & BGA Board Level Underfills Market, Segmentation by Type:

Liquid

Paste

Others

Global CSP & BGA Board Level Underfills Market, Segmentation by Application Technology:

Capillary Underfill

No-Flow Underfill

Others

Global CSP & BGA Board Level Underfills Market, Segmentation by End Use Package:

BGA Package

CSP Package

WLCSP and LGA Package

Others

Global CSP & BGA Board Level Underfills Market, Segmentation by Resin Chemistry:

Epoxy Based

Hybrid Resin Based

Others

Global CSP & BGA Board Level Underfills Market, Segmentation by Application:

Consumer Electronics

Automotive Electronics

Communications and Data Center

Industrial and Medical Electronics

Companies Profiled:

Weldtone Technology Co., Ltd.

Dover Chemical Electronic Materials Shanghai Co., Ltd.

Henkel AG & Co. KGaA

NAMICS Corporation

Panasonic Industry Co., Ltd.

Element Solutions Inc.

Resonac Corporation

ThreeBond Co., Ltd.

DELO Industrie Klebstoffe GmbH & Co. KGaA

Master Bond Inc.

AI Technology, Inc.

EpoxySet, Inc.

Key Questions Answered:

1. How big is the global CSP & BGA Board Level Underfills market?
2. What is the demand of the global CSP & BGA Board Level Underfills market?
3. What is the year over year growth of the global CSP & BGA Board Level Underfills market?
4. What is the production and production value of the global CSP & BGA Board Level Underfills market?
5. Who are the key producers in the global CSP & BGA Board Level Underfills market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 CSP & BGA Board Level Underfills Introduction
- 1.2 World CSP & BGA Board Level Underfills Supply & Forecast
 - 1.2.1 World CSP & BGA Board Level Underfills Production Value (2021 & 2025 & 2032)
 - 1.2.2 World CSP & BGA Board Level Underfills Production (2021-2032)
 - 1.2.3 World CSP & BGA Board Level Underfills Pricing Trends (2021-2032)
- 1.3 World CSP & BGA Board Level Underfills Production by Region (Based on Production Site)
 - 1.3.1 World CSP & BGA Board Level Underfills Production Value by Region (2021-2032)
 - 1.3.2 World CSP & BGA Board Level Underfills Production by Region (2021-2032)
 - 1.3.3 World CSP & BGA Board Level Underfills Average Price by Region (2021-2032)
 - 1.3.4 North America CSP & BGA Board Level Underfills Production (2021-2032)
 - 1.3.5 Europe CSP & BGA Board Level Underfills Production (2021-2032)
 - 1.3.6 China CSP & BGA Board Level Underfills Production (2021-2032)
 - 1.3.7 Japan CSP & BGA Board Level Underfills Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 CSP & BGA Board Level Underfills Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 CSP & BGA Board Level Underfills Major Market Trends

2 DEMAND SUMMARY

- 2.1 World CSP & BGA Board Level Underfills Demand (2021-2032)
- 2.2 World CSP & BGA Board Level Underfills Consumption by Region
 - 2.2.1 World CSP & BGA Board Level Underfills Consumption by Region (2021-2026)
 - 2.2.2 World CSP & BGA Board Level Underfills Consumption Forecast by Region (2027-2032)
- 2.3 United States CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.4 China CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.5 Europe CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.6 Japan CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.7 South Korea CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.8 ASEAN CSP & BGA Board Level Underfills Consumption (2021-2032)
- 2.9 India CSP & BGA Board Level Underfills Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World CSP & BGA Board Level Underfills Production Value by Manufacturer (2021-2026)

3.2 World CSP & BGA Board Level Underfills Production by Manufacturer (2021-2026)

3.3 World CSP & BGA Board Level Underfills Average Price by Manufacturer (2021-2026)

3.4 CSP & BGA Board Level Underfills Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global CSP & BGA Board Level Underfills Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for CSP & BGA Board Level Underfills in 2025

3.5.3 Global Concentration Ratios (CR8) for CSP & BGA Board Level Underfills in 2025

3.6 CSP & BGA Board Level Underfills Market: Overall Company Footprint Analysis

3.6.1 CSP & BGA Board Level Underfills Market: Region Footprint

3.6.2 CSP & BGA Board Level Underfills Market: Company Product Type Footprint

3.6.3 CSP & BGA Board Level Underfills Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: CSP & BGA Board Level Underfills Production Value Comparison

4.1.1 United States VS China: CSP & BGA Board Level Underfills Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: CSP & BGA Board Level Underfills Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: CSP & BGA Board Level Underfills Production Comparison

4.2.1 United States VS China: CSP & BGA Board Level Underfills Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: CSP & BGA Board Level Underfills Production Market

Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: CSP & BGA Board Level Underfills Consumption Comparison

4.3.1 United States VS China: CSP & BGA Board Level Underfills Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: CSP & BGA Board Level Underfills Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based CSP & BGA Board Level Underfills Manufacturers and Market Share, 2021-2026

4.4.1 United States Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers CSP & BGA Board Level Underfills Production Value (2021-2026)

4.4.3 United States Based Manufacturers CSP & BGA Board Level Underfills Production (2021-2026)

4.5 China Based CSP & BGA Board Level Underfills Manufacturers and Market Share

4.5.1 China Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers CSP & BGA Board Level Underfills Production Value (2021-2026)

4.5.3 China Based Manufacturers CSP & BGA Board Level Underfills Production (2021-2026)

4.6 Rest of World Based CSP & BGA Board Level Underfills Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World CSP & BGA Board Level Underfills Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Liquid

5.2.2 Paste

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World CSP & BGA Board Level Underfills Production by Type (2021-2032)

5.3.2 World CSP & BGA Board Level Underfills Production Value by Type (2021-2032)

5.3.3 World CSP & BGA Board Level Underfills Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY APPLICATION TECHNOLOGY

6.1 World CSP & BGA Board Level Underfills Market Size Overview by Application Technology: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Application Technology

6.2.1 Capillary Underfill

6.2.2 No-Flow Underfill

6.2.3 Others

6.3 Market Segment by Application Technology

6.3.1 World CSP & BGA Board Level Underfills Production by Application Technology (2021-2032)

6.3.2 World CSP & BGA Board Level Underfills Production Value by Application Technology (2021-2032)

6.3.3 World CSP & BGA Board Level Underfills Average Price by Application Technology (2021-2032)

7 MARKET ANALYSIS BY END USE PACKAGE

7.1 World CSP & BGA Board Level Underfills Market Size Overview by End Use Package: 2021 VS 2025 VS 2032

7.2 Segment Introduction by End Use Package

7.2.1 BGA Package

7.2.2 CSP Package

7.2.3 WLCSP and LGA Package

7.2.4 Others

7.3 Market Segment by End Use Package

7.3.1 World CSP & BGA Board Level Underfills Production by End Use Package (2021-2032)

7.3.2 World CSP & BGA Board Level Underfills Production Value by End Use Package (2021-2032)

7.3.3 World CSP & BGA Board Level Underfills Average Price by End Use Package (2021-2032)

8 MARKET ANALYSIS BY RESIN CHEMISTRY

8.1 World CSP & BGA Board Level Underfills Market Size Overview by Resin Chemistry: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Resin Chemistry

8.2.1 Epoxy Based

8.2.2 Hybrid Resin Based

8.2.3 Others

8.3 Market Segment by Resin Chemistry

8.3.1 World CSP & BGA Board Level Underfills Production by Resin Chemistry (2021-2032)

8.3.2 World CSP & BGA Board Level Underfills Production Value by Resin Chemistry (2021-2032)

8.3.3 World CSP & BGA Board Level Underfills Average Price by Resin Chemistry (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World CSP & BGA Board Level Underfills Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Consumer Electronics

9.2.2 Automotive Electronics

9.2.3 Communications and Data Center

9.2.4 Industrial and Medical Electronics

9.3 Market Segment by Application

9.3.1 World CSP & BGA Board Level Underfills Production by Application (2021-2032)

9.3.2 World CSP & BGA Board Level Underfills Production Value by Application (2021-2032)

9.3.3 World CSP & BGA Board Level Underfills Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Weldtone Technology Co., Ltd.

10.1.1 Weldtone Technology Co., Ltd. Details

10.1.2 Weldtone Technology Co., Ltd. Major Business

10.1.3 Weldtone Technology Co., Ltd. CSP & BGA Board Level Underfills Product and Services

10.1.4 Weldtone Technology Co., Ltd. CSP & BGA Board Level Underfills Production,

Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Weldtone Technology Co., Ltd. Recent Developments/Updates

10.1.6 Weldtone Technology Co., Ltd. Competitive Strengths & Weaknesses

10.2 Dover Chemical Electronic Materials Shanghai Co., Ltd.

10.2.1 Dover Chemical Electronic Materials Shanghai Co., Ltd. Details

10.2.2 Dover Chemical Electronic Materials Shanghai Co., Ltd. Major Business

10.2.3 Dover Chemical Electronic Materials Shanghai Co., Ltd. CSP & BGA Board Level Underfills Product and Services

10.2.4 Dover Chemical Electronic Materials Shanghai Co., Ltd. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 Dover Chemical Electronic Materials Shanghai Co., Ltd. Recent Developments/Updates

10.2.6 Dover Chemical Electronic Materials Shanghai Co., Ltd. Competitive Strengths & Weaknesses

10.3 Henkel AG & Co. KGaA

10.3.1 Henkel AG & Co. KGaA Details

10.3.2 Henkel AG & Co. KGaA Major Business

10.3.3 Henkel AG & Co. KGaA CSP & BGA Board Level Underfills Product and Services

10.3.4 Henkel AG & Co. KGaA CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Henkel AG & Co. KGaA Recent Developments/Updates

10.3.6 Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

10.4 NAMICS Corporation

10.4.1 NAMICS Corporation Details

10.4.2 NAMICS Corporation Major Business

10.4.3 NAMICS Corporation CSP & BGA Board Level Underfills Product and Services

10.4.4 NAMICS Corporation CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 NAMICS Corporation Recent Developments/Updates

10.4.6 NAMICS Corporation Competitive Strengths & Weaknesses

10.5 Panasonic Industry Co., Ltd.

10.5.1 Panasonic Industry Co., Ltd. Details

10.5.2 Panasonic Industry Co., Ltd. Major Business

10.5.3 Panasonic Industry Co., Ltd. CSP & BGA Board Level Underfills Product and Services

10.5.4 Panasonic Industry Co., Ltd. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 Panasonic Industry Co., Ltd. Recent Developments/Updates

- 10.5.6 Panasonic Industry Co., Ltd. Competitive Strengths & Weaknesses
- 10.6 Element Solutions Inc.
 - 10.6.1 Element Solutions Inc. Details
 - 10.6.2 Element Solutions Inc. Major Business
 - 10.6.3 Element Solutions Inc. CSP & BGA Board Level Underfills Product and Services
 - 10.6.4 Element Solutions Inc. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.6.5 Element Solutions Inc. Recent Developments/Updates
 - 10.6.6 Element Solutions Inc. Competitive Strengths & Weaknesses
- 10.7 Resonac Corporation
 - 10.7.1 Resonac Corporation Details
 - 10.7.2 Resonac Corporation Major Business
 - 10.7.3 Resonac Corporation CSP & BGA Board Level Underfills Product and Services
 - 10.7.4 Resonac Corporation CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.7.5 Resonac Corporation Recent Developments/Updates
 - 10.7.6 Resonac Corporation Competitive Strengths & Weaknesses
- 10.8 ThreeBond Co., Ltd.
 - 10.8.1 ThreeBond Co., Ltd. Details
 - 10.8.2 ThreeBond Co., Ltd. Major Business
 - 10.8.3 ThreeBond Co., Ltd. CSP & BGA Board Level Underfills Product and Services
 - 10.8.4 ThreeBond Co., Ltd. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.8.5 ThreeBond Co., Ltd. Recent Developments/Updates
 - 10.8.6 ThreeBond Co., Ltd. Competitive Strengths & Weaknesses
- 10.9 DELO Industrie Klebstoffe GmbH & Co. KGaA
 - 10.9.1 DELO Industrie Klebstoffe GmbH & Co. KGaA Details
 - 10.9.2 DELO Industrie Klebstoffe GmbH & Co. KGaA Major Business
 - 10.9.3 DELO Industrie Klebstoffe GmbH & Co. KGaA CSP & BGA Board Level Underfills Product and Services
 - 10.9.4 DELO Industrie Klebstoffe GmbH & Co. KGaA CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 DELO Industrie Klebstoffe GmbH & Co. KGaA Recent Developments/Updates
 - 10.9.6 DELO Industrie Klebstoffe GmbH & Co. KGaA Competitive Strengths & Weaknesses
- 10.10 Master Bond Inc.
 - 10.10.1 Master Bond Inc. Details
 - 10.10.2 Master Bond Inc. Major Business

- 10.10.3 Master Bond Inc. CSP & BGA Board Level Underfills Product and Services
- 10.10.4 Master Bond Inc. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.10.5 Master Bond Inc. Recent Developments/Updates
- 10.10.6 Master Bond Inc. Competitive Strengths & Weaknesses
- 10.11 AI Technology, Inc.
 - 10.11.1 AI Technology, Inc. Details
 - 10.11.2 AI Technology, Inc. Major Business
 - 10.11.3 AI Technology, Inc. CSP & BGA Board Level Underfills Product and Services
 - 10.11.4 AI Technology, Inc. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.11.5 AI Technology, Inc. Recent Developments/Updates
 - 10.11.6 AI Technology, Inc. Competitive Strengths & Weaknesses
- 10.12 EpoxySet, Inc.
 - 10.12.1 EpoxySet, Inc. Details
 - 10.12.2 EpoxySet, Inc. Major Business
 - 10.12.3 EpoxySet, Inc. CSP & BGA Board Level Underfills Product and Services
 - 10.12.4 EpoxySet, Inc. CSP & BGA Board Level Underfills Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.12.5 EpoxySet, Inc. Recent Developments/Updates
 - 10.12.6 EpoxySet, Inc. Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 CSP & BGA Board Level Underfills Industry Chain
- 11.2 CSP & BGA Board Level Underfills Upstream Analysis
 - 11.2.1 CSP & BGA Board Level Underfills Core Raw Materials
 - 11.2.2 Main Manufacturers of CSP & BGA Board Level Underfills Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 CSP & BGA Board Level Underfills Production Mode
- 11.6 CSP & BGA Board Level Underfills Procurement Model
- 11.7 CSP & BGA Board Level Underfills Industry Sales Model and Sales Channels
 - 11.7.1 CSP & BGA Board Level Underfills Sales Model
 - 11.7.2 CSP & BGA Board Level Underfills Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World CSP & BGA Board Level Underfills Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World CSP & BGA Board Level Underfills Production Value by Region (2021-2026) & (USD Million)

Table 3. World CSP & BGA Board Level Underfills Production Value by Region (2027-2032) & (USD Million)

Table 4. World CSP & BGA Board Level Underfills Production Value Market Share by Region (2021-2026)

Table 5. World CSP & BGA Board Level Underfills Production Value Market Share by Region (2027-2032)

Table 6. World CSP & BGA Board Level Underfills Production by Region (2021-2026) & (Tons)

Table 7. World CSP & BGA Board Level Underfills Production by Region (2027-2032) & (Tons)

Table 8. World CSP & BGA Board Level Underfills Production Market Share by Region (2021-2026)

Table 9. World CSP & BGA Board Level Underfills Production Market Share by Region (2027-2032)

Table 10. World CSP & BGA Board Level Underfills Average Price by Region (2021-2026) & (US\$/kg)

Table 11. World CSP & BGA Board Level Underfills Average Price by Region (2027-2032) & (US\$/kg)

Table 12. CSP & BGA Board Level Underfills Major Market Trends

Table 13. World CSP & BGA Board Level Underfills Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World CSP & BGA Board Level Underfills Consumption by Region (2021-2026) & (Tons)

Table 15. World CSP & BGA Board Level Underfills Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World CSP & BGA Board Level Underfills Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key CSP & BGA Board Level Underfills Producers in 2025

Table 18. World CSP & BGA Board Level Underfills Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key CSP & BGA Board Level Underfills Producers in 2025

Table 20. World CSP & BGA Board Level Underfills Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 21. Global CSP & BGA Board Level Underfills Company Evaluation Quadrant

Table 22. World CSP & BGA Board Level Underfills Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and CSP & BGA Board Level Underfills Production Site of Key Manufacturer

Table 24. CSP & BGA Board Level Underfills Market: Company Product Type Footprint

Table 25. CSP & BGA Board Level Underfills Market: Company Product Application Footprint

Table 26. CSP & BGA Board Level Underfills Competitive Factors

Table 27. CSP & BGA Board Level Underfills New Entrant and Capacity Expansion Plans

Table 28. CSP & BGA Board Level Underfills Mergers & Acquisitions Activity

Table 29. United States VS China CSP & BGA Board Level Underfills Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China CSP & BGA Board Level Underfills Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China CSP & BGA Board Level Underfills Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers CSP & BGA Board Level Underfills Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers CSP & BGA Board Level Underfills Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers CSP & BGA Board Level Underfills Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers CSP & BGA Board Level Underfills Production Market Share (2021-2026)

Table 37. China Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers CSP & BGA Board Level Underfills Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers CSP & BGA Board Level Underfills Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers CSP & BGA Board Level Underfills Production,

(2021-2026) & (Tons)

Table 41. China Based Manufacturers CSP & BGA Board Level Underfills Production Market Share (2021-2026)

Table 42. Rest of World Based CSP & BGA Board Level Underfills Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production Market Share (2021-2026)

Table 47. World CSP & BGA Board Level Underfills Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World CSP & BGA Board Level Underfills Production by Type (2021-2026) & (Tons)

Table 49. World CSP & BGA Board Level Underfills Production by Type (2027-2032) & (Tons)

Table 50. World CSP & BGA Board Level Underfills Production Value by Type (2021-2026) & (USD Million)

Table 51. World CSP & BGA Board Level Underfills Production Value by Type (2027-2032) & (USD Million)

Table 52. World CSP & BGA Board Level Underfills Average Price by Type (2021-2026) & (US\$/kg)

Table 53. World CSP & BGA Board Level Underfills Average Price by Type (2027-2032) & (US\$/kg)

Table 54. World CSP & BGA Board Level Underfills Production Value by Application Technology, (USD Million), 2021 & 2025 & 2032

Table 55. World CSP & BGA Board Level Underfills Production by Application Technology (2021-2026) & (Tons)

Table 56. World CSP & BGA Board Level Underfills Production by Application Technology (2027-2032) & (Tons)

Table 57. World CSP & BGA Board Level Underfills Production Value by Application Technology (2021-2026) & (USD Million)

Table 58. World CSP & BGA Board Level Underfills Production Value by Application Technology (2027-2032) & (USD Million)

Table 59. World CSP & BGA Board Level Underfills Average Price by Application Technology (2021-2026) & (US\$/kg)

Table 60. World CSP & BGA Board Level Underfills Average Price by Application Technology (2027-2032) & (US\$/kg)

Table 61. World CSP & BGA Board Level Underfills Production Value by End Use Package, (USD Million), 2021 & 2025 & 2032

Table 62. World CSP & BGA Board Level Underfills Production by End Use Package (2021-2026) & (Tons)

Table 63. World CSP & BGA Board Level Underfills Production by End Use Package (2027-2032) & (Tons)

Table 64. World CSP & BGA Board Level Underfills Production Value by End Use Package (2021-2026) & (USD Million)

Table 65. World CSP & BGA Board Level Underfills Production Value by End Use Package (2027-2032) & (USD Million)

Table 66. World CSP & BGA Board Level Underfills Average Price by End Use Package (2021-2026) & (US\$/kg)

Table 67. World CSP & BGA Board Level Underfills Average Price by End Use Package (2027-2032) & (US\$/kg)

Table 68. World CSP & BGA Board Level Underfills Production Value by Resin Chemistry, (USD Million), 2021 & 2025 & 2032

Table 69. World CSP & BGA Board Level Underfills Production by Resin Chemistry (2021-2026) & (Tons)

Table 70. World CSP & BGA Board Level Underfills Production by Resin Chemistry (2027-2032) & (Tons)

Table 71. World CSP & BGA Board Level Underfills Production Value by Resin Chemistry (2021-2026) & (USD Million)

Table 72. World CSP & BGA Board Level Underfills Production Value by Resin Chemistry (2027-2032) & (USD Million)

Table 73. World CSP & BGA Board Level Underfills Average Price by Resin Chemistry (2021-2026) & (US\$/kg)

Table 74. World CSP & BGA Board Level Underfills Average Price by Resin Chemistry (2027-2032) & (US\$/kg)

Table 75. World CSP & BGA Board Level Underfills Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World CSP & BGA Board Level Underfills Production by Application (2021-2026) & (Tons)

Table 77. World CSP & BGA Board Level Underfills Production by Application (2027-2032) & (Tons)

Table 78. World CSP & BGA Board Level Underfills Production Value by Application (2021-2026) & (USD Million)

Table 79. World CSP & BGA Board Level Underfills Production Value by Application

(2027-2032) & (USD Million)

Table 80. World CSP & BGA Board Level Underfills Average Price by Application (2021-2026) & (US\$/kg)

Table 81. World CSP & BGA Board Level Underfills Average Price by Application (2027-2032) & (US\$/kg)

Table 82. Weldtone Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 83. Weldtone Technology Co., Ltd. Major Business

Table 84. Weldtone Technology Co., Ltd. CSP & BGA Board Level Underfills Product and Services

Table 85. Weldtone Technology Co., Ltd. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Weldtone Technology Co., Ltd. Recent Developments/Updates

Table 87. Weldtone Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 88. Dover Chemical Electronic Materials Shanghai Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 89. Dover Chemical Electronic Materials Shanghai Co., Ltd. Major Business

Table 90. Dover Chemical Electronic Materials Shanghai Co., Ltd. CSP & BGA Board Level Underfills Product and Services

Table 91. Dover Chemical Electronic Materials Shanghai Co., Ltd. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Dover Chemical Electronic Materials Shanghai Co., Ltd. Recent Developments/Updates

Table 93. Dover Chemical Electronic Materials Shanghai Co., Ltd. Competitive Strengths & Weaknesses

Table 94. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 95. Henkel AG & Co. KGaA Major Business

Table 96. Henkel AG & Co. KGaA CSP & BGA Board Level Underfills Product and Services

Table 97. Henkel AG & Co. KGaA CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Henkel AG & Co. KGaA Recent Developments/Updates

Table 99. Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

Table 100. NAMICS Corporation Basic Information, Manufacturing Base and Competitors

Table 101. NAMICS Corporation Major Business

Table 102. NAMICS Corporation CSP & BGA Board Level Underfills Product and Services

Table 103. NAMICS Corporation CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. NAMICS Corporation Recent Developments/Updates

Table 105. NAMICS Corporation Competitive Strengths & Weaknesses

Table 106. Panasonic Industry Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 107. Panasonic Industry Co., Ltd. Major Business

Table 108. Panasonic Industry Co., Ltd. CSP & BGA Board Level Underfills Product and Services

Table 109. Panasonic Industry Co., Ltd. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Panasonic Industry Co., Ltd. Recent Developments/Updates

Table 111. Panasonic Industry Co., Ltd. Competitive Strengths & Weaknesses

Table 112. Element Solutions Inc. Basic Information, Manufacturing Base and Competitors

Table 113. Element Solutions Inc. Major Business

Table 114. Element Solutions Inc. CSP & BGA Board Level Underfills Product and Services

Table 115. Element Solutions Inc. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Element Solutions Inc. Recent Developments/Updates

Table 117. Element Solutions Inc. Competitive Strengths & Weaknesses

Table 118. Resonac Corporation Basic Information, Manufacturing Base and Competitors

Table 119. Resonac Corporation Major Business

Table 120. Resonac Corporation CSP & BGA Board Level Underfills Product and Services

Table 121. Resonac Corporation CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Resonac Corporation Recent Developments/Updates

Table 123. Resonac Corporation Competitive Strengths & Weaknesses

Table 124. ThreeBond Co., Ltd. Basic Information, Manufacturing Base and

Competitors

Table 125. ThreeBond Co., Ltd. Major Business

Table 126. ThreeBond Co., Ltd. CSP & BGA Board Level Underfills Product and Services

Table 127. ThreeBond Co., Ltd. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. ThreeBond Co., Ltd. Recent Developments/Updates

Table 129. ThreeBond Co., Ltd. Competitive Strengths & Weaknesses

Table 130. DELO Industrie Klebstoffe GmbH & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 131. DELO Industrie Klebstoffe GmbH & Co. KGaA Major Business

Table 132. DELO Industrie Klebstoffe GmbH & Co. KGaA CSP & BGA Board Level Underfills Product and Services

Table 133. DELO Industrie Klebstoffe GmbH & Co. KGaA CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. DELO Industrie Klebstoffe GmbH & Co. KGaA Recent Developments/Updates

Table 135. DELO Industrie Klebstoffe GmbH & Co. KGaA Competitive Strengths & Weaknesses

Table 136. Master Bond Inc. Basic Information, Manufacturing Base and Competitors

Table 137. Master Bond Inc. Major Business

Table 138. Master Bond Inc. CSP & BGA Board Level Underfills Product and Services

Table 139. Master Bond Inc. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Master Bond Inc. Recent Developments/Updates

Table 141. Master Bond Inc. Competitive Strengths & Weaknesses

Table 142. AI Technology, Inc. Basic Information, Manufacturing Base and Competitors

Table 143. AI Technology, Inc. Major Business

Table 144. AI Technology, Inc. CSP & BGA Board Level Underfills Product and Services

Table 145. AI Technology, Inc. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. AI Technology, Inc. Recent Developments/Updates

Table 147. AI Technology, Inc. Competitive Strengths & Weaknesses

Table 148. EpoxySet, Inc. Basic Information, Manufacturing Base and Competitors

Table 149. EpoxySet, Inc. Major Business

Table 150. EpoxySet, Inc. CSP & BGA Board Level Underfills Product and Services

Table 151. EpoxySet, Inc. CSP & BGA Board Level Underfills Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. EpoxySet, Inc. Recent Developments/Updates

Table 153. EpoxySet, Inc. Competitive Strengths & Weaknesses

Table 154. Global Key Players of CSP & BGA Board Level Underfills Upstream (Raw Materials)

Table 155. Global CSP & BGA Board Level Underfills Typical Customers

Table 156. CSP & BGA Board Level Underfills Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. CSP & BGA Board Level Underfills Picture

Figure 2. World CSP & BGA Board Level Underfills Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World CSP & BGA Board Level Underfills Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World CSP & BGA Board Level Underfills Production (2021-2032) & (Tons)

Figure 5. World CSP & BGA Board Level Underfills Average Price (2021-2032) & (US\$/kg)

Figure 6. World CSP & BGA Board Level Underfills Production Value Market Share by Region (2021-2032)

Figure 7. World CSP & BGA Board Level Underfills Production Market Share by Region (2021-2032)

Figure 8. North America CSP & BGA Board Level Underfills Production (2021-2032) & (Tons)

Figure 9. Europe CSP & BGA Board Level Underfills Production (2021-2032) & (Tons)

Figure 10. China CSP & BGA Board Level Underfills Production (2021-2032) & (Tons)

Figure 11. Japan CSP & BGA Board Level Underfills Production (2021-2032) & (Tons)

Figure 12. CSP & BGA Board Level Underfills Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 15. World CSP & BGA Board Level Underfills Consumption Market Share by Region (2021-2032)

Figure 16. United States CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 17. China CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 18. Europe CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 19. Japan CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 20. South Korea CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 21. ASEAN CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 22. India CSP & BGA Board Level Underfills Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of CSP & BGA Board Level Underfills by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for CSP & BGA Board Level Underfills Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for CSP & BGA Board Level Underfills Markets in 2025

Figure 26. United States VS China: CSP & BGA Board Level Underfills Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: CSP & BGA Board Level Underfills Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: CSP & BGA Board Level Underfills Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers CSP & BGA Board Level Underfills Production Market Share 2025

Figure 30. China Based Manufacturers CSP & BGA Board Level Underfills Production Market Share 2025

Figure 31. Rest of World Based Manufacturers CSP & BGA Board Level Underfills Production Market Share 2025

Figure 32. World CSP & BGA Board Level Underfills Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World CSP & BGA Board Level Underfills Production Value Market Share by Type in 2025

Figure 34. Liquid

Figure 35. Paste

Figure 36. Others

Figure 37. World CSP & BGA Board Level Underfills Production Market Share by Type (2021-2032)

Figure 38. World CSP & BGA Board Level Underfills Production Value Market Share by Type (2021-2032)

Figure 39. World CSP & BGA Board Level Underfills Average Price by Type (2021-2032) & (US\$/kg)

Figure 40. World CSP & BGA Board Level Underfills Production Value by Application Technology, (USD Million), 2021 & 2025 & 2032

Figure 41. World CSP & BGA Board Level Underfills Production Value Market Share by Application Technology in 2025

Figure 42. Capillary Underfill

Figure 43. No-Flow Underfill

Figure 44. Others

Figure 45. World CSP & BGA Board Level Underfills Production Market Share by Application Technology (2021-2032)

Figure 46. World CSP & BGA Board Level Underfills Production Value Market Share by Application Technology (2021-2032)

Figure 47. World CSP & BGA Board Level Underfills Average Price by Application Technology (2021-2032) & (US\$/kg)

Figure 48. World CSP & BGA Board Level Underfills Production Value by End Use Package, (USD Million), 2021 & 2025 & 2032

Figure 49. World CSP & BGA Board Level Underfills Production Value Market Share by End Use Package in 2025

Figure 50. BGA Package

Figure 51. CSP Package

Figure 52. WLCSP and LGA Package

Figure 53. Others

Figure 54. World CSP & BGA Board Level Underfills Production Market Share by End Use Package (2021-2032)

Figure 55. World CSP & BGA Board Level Underfills Production Value Market Share by End Use Package (2021-2032)

Figure 56. World CSP & BGA Board Level Underfills Average Price by End Use Package (2021-2032) & (US\$/kg)

Figure 57. World CSP & BGA Board Level Underfills Production Value by Resin Chemistry, (USD Million), 2021 & 2025 & 2032

Figure 58. World CSP & BGA Board Level Underfills Production Value Market Share by Resin Chemistry in 2025

Figure 59. Epoxy Based

Figure 60. Hybrid Resin Based

Figure 61. Others

Figure 62. World CSP & BGA Board Level Underfills Production Market Share by Resin Chemistry (2021-2032)

Figure 63. World CSP & BGA Board Level Underfills Production Value Market Share by Resin Chemistry (2021-2032)

Figure 64. World CSP & BGA Board Level Underfills Average Price by Resin Chemistry (2021-2032) & (US\$/kg)

Figure 65. World CSP & BGA Board Level Underfills Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 66. World CSP & BGA Board Level Underfills Production Value Market Share by Application in 2025

Figure 67. Consumer Electronics

Figure 68. Automotive Electronics

Figure 69. Communications and Data Center

Figure 70. Industrial and Medical Electronics

Figure 71. World CSP & BGA Board Level Underfills Production Market Share by Application (2021-2032)

Figure 72. World CSP & BGA Board Level Underfills Production Value Market Share by Application (2021-2032)

Figure 73. World CSP & BGA Board Level Underfills Average Price by Application (2021-2032) & (US\$/kg)

Figure 74. CSP & BGA Board Level Underfills Industry Chain

Figure 75. CSP & BGA Board Level Underfills Procurement Model

Figure 76. CSP & BGA Board Level Underfills Sales Model

Figure 77. CSP & BGA Board Level Underfills Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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