

Global Die Attach Adhesives for LED Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Die Attach Adhesives for LED market size is expected to reach \$ 163 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

Die Attach Adhesives for LED are functional bonding materials used in LED packaging to secure LED chips to brackets, ceramic substrates, metal substrates, PCBs, or lead frames. Beyond merely 'adhering the chip,' these adhesives perform a range of functions depending on the specific packaging structure, including thermal conduction, electrical conduction or insulation, stress buffering, resistance to thermal aging and light-induced yellowing, and the enhancement of overall packaging reliability. The upstream segment of the LED chip adhesive industry chain primarily comprises raw materials such as epoxy resins, silicone resins, acrylic resins, silver powder, aluminum oxide, aluminum nitride, boron nitride, and silicon dioxide (silica), as well as various thermal fillers. The resin system dictates the material's thermal stability, light resistance, and bonding reliability, while the filler system determines its thermal conductivity, electrical conductivity, and dispensing stability. The downstream segment consists mainly of LED packaging plants and optoelectronic device manufacturers, serving sectors such as lighting and automotive. Given that LED chips simultaneously emit light and generate heat, die-attach adhesives must strike a balance between thermal conduction, thermal-optical stability, low volatility, low ionic content, low stress, and compatibility with automated dispensing systems; consequently, they stand as one of the critical materials influencing LED package heat dissipation, light decay, reliability, and manufacturing yield rates. By 2025, global sales volume for LED chip adhesives is projected to reach the scale of hundreds of tons. The comprehensive average price is estimated to range from approximately \$250 to \$800 per kilogram, with the industry maintaining a gross profit margin of roughly 30% to 50%.

Die Attach Adhesives for LED constitute a critical class of functional materials within the realm of LED packaging. Primarily utilized to secure LED chips onto brackets, substrates, or lead frames, these adhesives simultaneously fulfill functions related to bonding, thermal conduction, stress buffering, and—in some instances—electrical connectivity. Industry demand is currently driven by advancements in high-brightness LEDs, automotive lighting, and Mini/Micro LED display technologies. However, the sector faces challenges stemming from the significant divergence in LED packaging applications: while traditional adhesives for low-to-mid-range lighting face intense price competition, high-end applications—such as those in automotive lighting, Mini/Micro LEDs, high-power LEDs, and UV LEDs—entail lengthy validation cycles and impose rigorous requirements regarding formulation, rheology, curing characteristics, thermal fillers, silver powder systems, and batch-to-batch stability. As LED chip power densities increase, package dimensions shrink, and end-product reliability standards rise, die-attach adhesives have evolved from mere 'bonding agents' into sophisticated functional materials capable of delivering thermal conductivity, electrical conductivity (or insulation), low-stress performance, resistance to light and thermal aging, and compatibility with automated dispensing systems.

This report studies the global Die Attach Adhesives for LED production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Die Attach Adhesives for LED 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 Die Attach Adhesives for LED that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Die Attach Adhesives for LED total production and demand, 2021-2032, (Tons)

Global Die Attach Adhesives for LED total production value, 2021-2032, (USD Million)

Global Die Attach Adhesives for LED production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Die Attach Adhesives for LED consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Die Attach Adhesives for LED domestic production, consumption, key domestic manufacturers and share

Global Die Attach Adhesives for LED production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Die Attach Adhesives for LED production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Die Attach Adhesives for LED production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Die Attach Adhesives for LED 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 Qnity Electronics, Momentive, Henkel, Nagase, HOENLE Adhesives, Kyocera, Pelnox, NAMICS, Shin-Etsu, Beijing KMT Technology, 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 Die Attach Adhesives for LED 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 Die Attach Adhesives for LED Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Die Attach Adhesives for LED Market, Segmentation by Type:

Acrylate Adhesives

Polyimide Adhesives

Epoxy Adhesives

Global Die Attach Adhesives for LED Market, Segmentation by Performance:

Conductive Type

Insulating Type

Global Die Attach Adhesives for LED Market, Segmentation by Curing Method:

Thermal Curing

UV Curing

Other

Global Die Attach Adhesives for LED Market, Segmentation by Application:

Illumination and Lighting

Automotive

Consumer Electronics

Others

Companies Profiled:

Qnity Electronics

Momentive

Henkel

Nagase

HOENLE Adhesives

Kyocera

Pelnox

NAMICS

Shin-Etsu

Beijing KMT Technology

Darbond Technology

Key Questions Answered:

1. How big is the global Die Attach Adhesives for LED market?
2. What is the demand of the global Die Attach Adhesives for LED market?
3. What is the year over year growth of the global Die Attach Adhesives for LED market?
4. What is the production and production value of the global Die Attach Adhesives for LED market?
5. Who are the key producers in the global Die Attach Adhesives for LED market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Die Attach Adhesives for LED Demand (2021-2032)
- 2.2 World Die Attach Adhesives for LED Consumption by Region
 - 2.2.1 World Die Attach Adhesives for LED Consumption by Region (2021-2026)
 - 2.2.2 World Die Attach Adhesives for LED Consumption Forecast by Region (2027-2032)
- 2.3 United States Die Attach Adhesives for LED Consumption (2021-2032)
- 2.4 China Die Attach Adhesives for LED Consumption (2021-2032)
- 2.5 Europe Die Attach Adhesives for LED Consumption (2021-2032)
- 2.6 Japan Die Attach Adhesives for LED Consumption (2021-2032)
- 2.7 South Korea Die Attach Adhesives for LED Consumption (2021-2032)
- 2.8 ASEAN Die Attach Adhesives for LED Consumption (2021-2032)
- 2.9 India Die Attach Adhesives for LED Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Die Attach Adhesives for LED Production Value by Manufacturer (2021-2026)
- 3.2 World Die Attach Adhesives for LED Production by Manufacturer (2021-2026)
- 3.3 World Die Attach Adhesives for LED Average Price by Manufacturer (2021-2026)
- 3.4 Die Attach Adhesives for LED Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Die Attach Adhesives for LED Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Die Attach Adhesives for LED in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Die Attach Adhesives for LED in 2025
- 3.6 Die Attach Adhesives for LED Market: Overall Company Footprint Analysis
 - 3.6.1 Die Attach Adhesives for LED Market: Region Footprint
 - 3.6.2 Die Attach Adhesives for LED Market: Company Product Type Footprint
 - 3.6.3 Die Attach Adhesives for LED 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: Die Attach Adhesives for LED Production Value Comparison
 - 4.1.1 United States VS China: Die Attach Adhesives for LED Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Die Attach Adhesives for LED Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Die Attach Adhesives for LED Production Comparison
 - 4.2.1 United States VS China: Die Attach Adhesives for LED Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Die Attach Adhesives for LED Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Die Attach Adhesives for LED Consumption Comparison
 - 4.3.1 United States VS China: Die Attach Adhesives for LED Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Die Attach Adhesives for LED Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Die Attach Adhesives for LED Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Die Attach Adhesives for LED Production Value (2021-2026)

4.4.3 United States Based Manufacturers Die Attach Adhesives for LED Production (2021-2026)

4.5 China Based Die Attach Adhesives for LED Manufacturers and Market Share

4.5.1 China Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Die Attach Adhesives for LED Production Value (2021-2026)

4.5.3 China Based Manufacturers Die Attach Adhesives for LED Production (2021-2026)

4.6 Rest of World Based Die Attach Adhesives for LED Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Die Attach Adhesives for LED Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Die Attach Adhesives for LED Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Die Attach Adhesives for LED Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Acrylate Adhesives

5.2.2 Polyimide Adhesives

5.2.3 Epoxy Adhesives

5.3 Market Segment by Type

5.3.1 World Die Attach Adhesives for LED Production by Type (2021-2032)

5.3.2 World Die Attach Adhesives for LED Production Value by Type (2021-2032)

5.3.3 World Die Attach Adhesives for LED Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PERFORMANCE

6.1 World Die Attach Adhesives for LED Market Size Overview by Performance: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Performance

6.2.1 Conductive Type

6.2.2 Insulating Type

6.3 Market Segment by Performance

6.3.1 World Die Attach Adhesives for LED Production by Performance (2021-2032)

6.3.2 World Die Attach Adhesives for LED Production Value by Performance (2021-2032)

6.3.3 World Die Attach Adhesives for LED Average Price by Performance (2021-2032)

7 MARKET ANALYSIS BY CURING METHOD

7.1 World Die Attach Adhesives for LED Market Size Overview by Curing Method: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Curing Method

7.2.1 Thermal Curing

7.2.2 UV Curing

7.2.3 Other

7.3 Market Segment by Curing Method

7.3.1 World Die Attach Adhesives for LED Production by Curing Method (2021-2032)

7.3.2 World Die Attach Adhesives for LED Production Value by Curing Method (2021-2032)

7.3.3 World Die Attach Adhesives for LED Average Price by Curing Method (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Die Attach Adhesives for LED Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Illumination and Lighting

8.2.2 Automotive

8.2.3 Consumer Electronics

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Die Attach Adhesives for LED Production by Application (2021-2032)

8.3.2 World Die Attach Adhesives for LED Production Value by Application (2021-2032)

8.3.3 World Die Attach Adhesives for LED Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Qnity Electronics

9.1.1 Qnity Electronics Details

9.1.2 Qnity Electronics Major Business

9.1.3 Qnity Electronics Die Attach Adhesives for LED Product and Services

9.1.4 Qnity Electronics Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Qnity Electronics Recent Developments/Updates

9.1.6 Qnity Electronics Competitive Strengths & Weaknesses

9.2 Momentive

9.2.1 Momentive Details

9.2.2 Momentive Major Business

9.2.3 Momentive Die Attach Adhesives for LED Product and Services

9.2.4 Momentive Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Momentive Recent Developments/Updates

9.2.6 Momentive Competitive Strengths & Weaknesses

9.3 Henkel

9.3.1 Henkel Details

9.3.2 Henkel Major Business

9.3.3 Henkel Die Attach Adhesives for LED Product and Services

9.3.4 Henkel Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Henkel Recent Developments/Updates

9.3.6 Henkel Competitive Strengths & Weaknesses

9.4 Nagase

9.4.1 Nagase Details

9.4.2 Nagase Major Business

9.4.3 Nagase Die Attach Adhesives for LED Product and Services

9.4.4 Nagase Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Nagase Recent Developments/Updates

9.4.6 Nagase Competitive Strengths & Weaknesses

9.5 HOENLE Adhesives

9.5.1 HOENLE Adhesives Details

9.5.2 HOENLE Adhesives Major Business

- 9.5.3 HOENLE Adhesives Die Attach Adhesives for LED Product and Services
- 9.5.4 HOENLE Adhesives Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.5.5 HOENLE Adhesives Recent Developments/Updates
- 9.5.6 HOENLE Adhesives Competitive Strengths & Weaknesses
- 9.6 Kyocera
 - 9.6.1 Kyocera Details
 - 9.6.2 Kyocera Major Business
 - 9.6.3 Kyocera Die Attach Adhesives for LED Product and Services
 - 9.6.4 Kyocera Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Kyocera Recent Developments/Updates
 - 9.6.6 Kyocera Competitive Strengths & Weaknesses
- 9.7 Pelnox
 - 9.7.1 Pelnox Details
 - 9.7.2 Pelnox Major Business
 - 9.7.3 Pelnox Die Attach Adhesives for LED Product and Services
 - 9.7.4 Pelnox Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Pelnox Recent Developments/Updates
 - 9.7.6 Pelnox Competitive Strengths & Weaknesses
- 9.8 NAMICS
 - 9.8.1 NAMICS Details
 - 9.8.2 NAMICS Major Business
 - 9.8.3 NAMICS Die Attach Adhesives for LED Product and Services
 - 9.8.4 NAMICS Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 NAMICS Recent Developments/Updates
 - 9.8.6 NAMICS Competitive Strengths & Weaknesses
- 9.9 Shin-Etsu
 - 9.9.1 Shin-Etsu Details
 - 9.9.2 Shin-Etsu Major Business
 - 9.9.3 Shin-Etsu Die Attach Adhesives for LED Product and Services
 - 9.9.4 Shin-Etsu Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Shin-Etsu Recent Developments/Updates
 - 9.9.6 Shin-Etsu Competitive Strengths & Weaknesses
- 9.10 Beijing KMT Technology
 - 9.10.1 Beijing KMT Technology Details

- 9.10.2 Beijing KMT Technology Major Business
- 9.10.3 Beijing KMT Technology Die Attach Adhesives for LED Product and Services
- 9.10.4 Beijing KMT Technology Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.10.5 Beijing KMT Technology Recent Developments/Updates
- 9.10.6 Beijing KMT Technology Competitive Strengths & Weaknesses
- 9.11 Darbond Technology
 - 9.11.1 Darbond Technology Details
 - 9.11.2 Darbond Technology Major Business
 - 9.11.3 Darbond Technology Die Attach Adhesives for LED Product and Services
 - 9.11.4 Darbond Technology Die Attach Adhesives for LED Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Darbond Technology Recent Developments/Updates
 - 9.11.6 Darbond Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Die Attach Adhesives for LED Industry Chain
- 10.2 Die Attach Adhesives for LED Upstream Analysis
 - 10.2.1 Die Attach Adhesives for LED Core Raw Materials
 - 10.2.2 Main Manufacturers of Die Attach Adhesives for LED Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Die Attach Adhesives for LED Production Mode
- 10.6 Die Attach Adhesives for LED Procurement Model
- 10.7 Die Attach Adhesives for LED Industry Sales Model and Sales Channels
 - 10.7.1 Die Attach Adhesives for LED Sales Model
 - 10.7.2 Die Attach Adhesives for LED Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Die Attach Adhesives for LED Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Die Attach Adhesives for LED Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Die Attach Adhesives for LED Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Die Attach Adhesives for LED Production Value Market Share by Region (2021-2026)
- Table 5. World Die Attach Adhesives for LED Production Value Market Share by Region (2027-2032)
- Table 6. World Die Attach Adhesives for LED Production by Region (2021-2026) & (Tons)
- Table 7. World Die Attach Adhesives for LED Production by Region (2027-2032) & (Tons)
- Table 8. World Die Attach Adhesives for LED Production Market Share by Region (2021-2026)
- Table 9. World Die Attach Adhesives for LED Production Market Share by Region (2027-2032)
- Table 10. World Die Attach Adhesives for LED Average Price by Region (2021-2026) & (US\$/Kg)
- Table 11. World Die Attach Adhesives for LED Average Price by Region (2027-2032) & (US\$/Kg)
- Table 12. Die Attach Adhesives for LED Major Market Trends
- Table 13. World Die Attach Adhesives for LED Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
- Table 14. World Die Attach Adhesives for LED Consumption by Region (2021-2026) & (Tons)
- Table 15. World Die Attach Adhesives for LED Consumption Forecast by Region (2027-2032) & (Tons)
- Table 16. World Die Attach Adhesives for LED Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Die Attach Adhesives for LED Producers in 2025
- Table 18. World Die Attach Adhesives for LED Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Die Attach Adhesives for LED Producers in 2025

Table 20. World Die Attach Adhesives for LED Average Price by Manufacturer (2021-2026) & (US\$/Kg)

Table 21. Global Die Attach Adhesives for LED Company Evaluation Quadrant

Table 22. World Die Attach Adhesives for LED Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Die Attach Adhesives for LED Production Site of Key Manufacturer

Table 24. Die Attach Adhesives for LED Market: Company Product Type Footprint

Table 25. Die Attach Adhesives for LED Market: Company Product Application Footprint

Table 26. Die Attach Adhesives for LED Competitive Factors

Table 27. Die Attach Adhesives for LED New Entrant and Capacity Expansion Plans

Table 28. Die Attach Adhesives for LED Mergers & Acquisitions Activity

Table 29. United States VS China Die Attach Adhesives for LED Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Die Attach Adhesives for LED Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Die Attach Adhesives for LED Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Die Attach Adhesives for LED Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Die Attach Adhesives for LED Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Die Attach Adhesives for LED Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Die Attach Adhesives for LED Production Market Share (2021-2026)

Table 37. China Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Die Attach Adhesives for LED Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Die Attach Adhesives for LED Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Die Attach Adhesives for LED Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Die Attach Adhesives for LED Production Market

Share (2021-2026)

Table 42. Rest of World Based Die Attach Adhesives for LED Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Die Attach Adhesives for LED Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Die Attach Adhesives for LED Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Die Attach Adhesives for LED Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Die Attach Adhesives for LED Production Market Share (2021-2026)

Table 47. World Die Attach Adhesives for LED Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Die Attach Adhesives for LED Production by Type (2021-2026) & (Tons)

Table 49. World Die Attach Adhesives for LED Production by Type (2027-2032) & (Tons)

Table 50. World Die Attach Adhesives for LED Production Value by Type (2021-2026) & (USD Million)

Table 51. World Die Attach Adhesives for LED Production Value by Type (2027-2032) & (USD Million)

Table 52. World Die Attach Adhesives for LED Average Price by Type (2021-2026) & (US\$/Kg)

Table 53. World Die Attach Adhesives for LED Average Price by Type (2027-2032) & (US\$/Kg)

Table 54. World Die Attach Adhesives for LED Production Value by Performance, (USD Million), 2021 & 2025 & 2032

Table 55. World Die Attach Adhesives for LED Production by Performance (2021-2026) & (Tons)

Table 56. World Die Attach Adhesives for LED Production by Performance (2027-2032) & (Tons)

Table 57. World Die Attach Adhesives for LED Production Value by Performance (2021-2026) & (USD Million)

Table 58. World Die Attach Adhesives for LED Production Value by Performance (2027-2032) & (USD Million)

Table 59. World Die Attach Adhesives for LED Average Price by Performance (2021-2026) & (US\$/Kg)

Table 60. World Die Attach Adhesives for LED Average Price by Performance (2027-2032) & (US\$/Kg)

Table 61. World Die Attach Adhesives for LED Production Value by Curing Method, (USD Million), 2021 & 2025 & 2032

Table 62. World Die Attach Adhesives for LED Production by Curing Method (2021-2026) & (Tons)

Table 63. World Die Attach Adhesives for LED Production by Curing Method (2027-2032) & (Tons)

Table 64. World Die Attach Adhesives for LED Production Value by Curing Method (2021-2026) & (USD Million)

Table 65. World Die Attach Adhesives for LED Production Value by Curing Method (2027-2032) & (USD Million)

Table 66. World Die Attach Adhesives for LED Average Price by Curing Method (2021-2026) & (US\$/Kg)

Table 67. World Die Attach Adhesives for LED Average Price by Curing Method (2027-2032) & (US\$/Kg)

Table 68. World Die Attach Adhesives for LED Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Die Attach Adhesives for LED Production by Application (2021-2026) & (Tons)

Table 70. World Die Attach Adhesives for LED Production by Application (2027-2032) & (Tons)

Table 71. World Die Attach Adhesives for LED Production Value by Application (2021-2026) & (USD Million)

Table 72. World Die Attach Adhesives for LED Production Value by Application (2027-2032) & (USD Million)

Table 73. World Die Attach Adhesives for LED Average Price by Application (2021-2026) & (US\$/Kg)

Table 74. World Die Attach Adhesives for LED Average Price by Application (2027-2032) & (US\$/Kg)

Table 75. Qnity Electronics Basic Information, Manufacturing Base and Competitors

Table 76. Qnity Electronics Major Business

Table 77. Qnity Electronics Die Attach Adhesives for LED Product and Services

Table 78. Qnity Electronics Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Qnity Electronics Recent Developments/Updates

Table 80. Qnity Electronics Competitive Strengths & Weaknesses

Table 81. Momentive Basic Information, Manufacturing Base and Competitors

Table 82. Momentive Major Business

Table 83. Momentive Die Attach Adhesives for LED Product and Services

Table 84. Momentive Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg),

- Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Momentive Recent Developments/Updates
- Table 86. Momentive Competitive Strengths & Weaknesses
- Table 87. Henkel Basic Information, Manufacturing Base and Competitors
- Table 88. Henkel Major Business
- Table 89. Henkel Die Attach Adhesives for LED Product and Services
- Table 90. Henkel Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Henkel Recent Developments/Updates
- Table 92. Henkel Competitive Strengths & Weaknesses
- Table 93. Nagase Basic Information, Manufacturing Base and Competitors
- Table 94. Nagase Major Business
- Table 95. Nagase Die Attach Adhesives for LED Product and Services
- Table 96. Nagase Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Nagase Recent Developments/Updates
- Table 98. Nagase Competitive Strengths & Weaknesses
- Table 99. HOENLE Adhesives Basic Information, Manufacturing Base and Competitors
- Table 100. HOENLE Adhesives Major Business
- Table 101. HOENLE Adhesives Die Attach Adhesives for LED Product and Services
- Table 102. HOENLE Adhesives Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. HOENLE Adhesives Recent Developments/Updates
- Table 104. HOENLE Adhesives Competitive Strengths & Weaknesses
- Table 105. Kyocera Basic Information, Manufacturing Base and Competitors
- Table 106. Kyocera Major Business
- Table 107. Kyocera Die Attach Adhesives for LED Product and Services
- Table 108. Kyocera Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Kyocera Recent Developments/Updates
- Table 110. Kyocera Competitive Strengths & Weaknesses
- Table 111. Pelnox Basic Information, Manufacturing Base and Competitors
- Table 112. Pelnox Major Business
- Table 113. Pelnox Die Attach Adhesives for LED Product and Services
- Table 114. Pelnox Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Pelnox Recent Developments/Updates
- Table 116. Pelnox Competitive Strengths & Weaknesses
- Table 117. NAMICS Basic Information, Manufacturing Base and Competitors

- Table 118. NAMICS Major Business
- Table 119. NAMICS Die Attach Adhesives for LED Product and Services
- Table 120. NAMICS Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. NAMICS Recent Developments/Updates
- Table 122. NAMICS Competitive Strengths & Weaknesses
- Table 123. Shin-Etsu Basic Information, Manufacturing Base and Competitors
- Table 124. Shin-Etsu Major Business
- Table 125. Shin-Etsu Die Attach Adhesives for LED Product and Services
- Table 126. Shin-Etsu Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Shin-Etsu Recent Developments/Updates
- Table 128. Shin-Etsu Competitive Strengths & Weaknesses
- Table 129. Beijing KMT Technology Basic Information, Manufacturing Base and Competitors
- Table 130. Beijing KMT Technology Major Business
- Table 131. Beijing KMT Technology Die Attach Adhesives for LED Product and Services
- Table 132. Beijing KMT Technology Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Beijing KMT Technology Recent Developments/Updates
- Table 134. Beijing KMT Technology Competitive Strengths & Weaknesses
- Table 135. Darbond Technology Basic Information, Manufacturing Base and Competitors
- Table 136. Darbond Technology Major Business
- Table 137. Darbond Technology Die Attach Adhesives for LED Product and Services
- Table 138. Darbond Technology Die Attach Adhesives for LED Production (Tons), Price (US\$/Kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Darbond Technology Recent Developments/Updates
- Table 140. Darbond Technology Competitive Strengths & Weaknesses
- Table 141. Global Key Players of Die Attach Adhesives for LED Upstream (Raw Materials)
- Table 142. Global Die Attach Adhesives for LED Typical Customers
- Table 143. Die Attach Adhesives for LED Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Die Attach Adhesives for LED Picture

Figure 2. World Die Attach Adhesives for LED Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Die Attach Adhesives for LED Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 5. World Die Attach Adhesives for LED Average Price (2021-2032) & (US\$/Kg)

Figure 6. World Die Attach Adhesives for LED Production Value Market Share by Region (2021-2032)

Figure 7. World Die Attach Adhesives for LED Production Market Share by Region (2021-2032)

Figure 8. North America Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 9. Europe Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 10. China Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 11. Japan Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 12. South Korea Die Attach Adhesives for LED Production (2021-2032) & (Tons)

Figure 13. Die Attach Adhesives for LED Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 16. World Die Attach Adhesives for LED Consumption Market Share by Region (2021-2032)

Figure 17. United States Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 18. China Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 19. Europe Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 20. Japan Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 21. South Korea Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 22. ASEAN Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 23. India Die Attach Adhesives for LED Consumption (2021-2032) & (Tons)

Figure 24. Producer Shipments of Die Attach Adhesives for LED by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Die Attach Adhesives for LED Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Die Attach Adhesives for

LED Markets in 2025

Figure 27. United States VS China: Die Attach Adhesives for LED Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Die Attach Adhesives for LED Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Die Attach Adhesives for LED Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Die Attach Adhesives for LED Production Market Share 2025

Figure 31. China Based Manufacturers Die Attach Adhesives for LED Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Die Attach Adhesives for LED Production Market Share 2025

Figure 33. World Die Attach Adhesives for LED Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Die Attach Adhesives for LED Production Value Market Share by Type in 2025

Figure 35. Acrylate Adhesives

Figure 36. Polyimid Adhesives

Figure 37. Epoxy Adhesives

Figure 38. World Die Attach Adhesives for LED Production Market Share by Type (2021-2032)

Figure 39. World Die Attach Adhesives for LED Production Value Market Share by Type (2021-2032)

Figure 40. World Die Attach Adhesives for LED Average Price by Type (2021-2032) & (US\$/Kg)

Figure 41. World Die Attach Adhesives for LED Production Value by Performance, (USD Million), 2021 & 2025 & 2032

Figure 42. World Die Attach Adhesives for LED Production Value Market Share by Performance in 2025

Figure 43. Conductive Type

Figure 44. Insulating Type

Figure 45. World Die Attach Adhesives for LED Production Market Share by Performance (2021-2032)

Figure 46. World Die Attach Adhesives for LED Production Value Market Share by Performance (2021-2032)

Figure 47. World Die Attach Adhesives for LED Average Price by Performance (2021-2032) & (US\$/Kg)

Figure 48. World Die Attach Adhesives for LED Production Value by Curing Method,

(USD Million), 2021 & 2025 & 2032

Figure 49. World Die Attach Adhesives for LED Production Value Market Share by Curing Method in 2025

Figure 50. Thermal Curing

Figure 51. UV Curing

Figure 52. Other

Figure 53. World Die Attach Adhesives for LED Production Market Share by Curing Method (2021-2032)

Figure 54. World Die Attach Adhesives for LED Production Value Market Share by Curing Method (2021-2032)

Figure 55. World Die Attach Adhesives for LED Average Price by Curing Method (2021-2032) & (US\$/Kg)

Figure 56. World Die Attach Adhesives for LED Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Die Attach Adhesives for LED Production Value Market Share by Application in 2025

Figure 58. Illumination and Lighting

Figure 59. Automotive

Figure 60. Consumer Electronics

Figure 61. Others

Figure 62. World Die Attach Adhesives for LED Production Market Share by Application (2021-2032)

Figure 63. World Die Attach Adhesives for LED Production Value Market Share by Application (2021-2032)

Figure 64. World Die Attach Adhesives for LED Average Price by Application (2021-2032) & (US\$/Kg)

Figure 65. Die Attach Adhesives for LED Industry Chain

Figure 66. Die Attach Adhesives for LED Procurement Model

Figure 67. Die Attach Adhesives for LED Sales Model

Figure 68. Die Attach Adhesives for LED Sales Channels, Direct Sales, and Distribution

Figure 69. Methodology

Figure 70. Research Process and Data Source

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