

Global Die Bonding Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Die Bonding Materials market size is expected to reach \$ 1297 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

Die bonding materials are critical interconnection materials used in semiconductor packaging to reliably attach bare dies to leadframes, ceramic substrates, organic substrates, metallized carriers, or power module bases. Their core function is to form stable mechanical support, thermal conduction paths, and, where necessary, electrically conductive or electrically insulating interfaces between the die and the package carrier. These materials are commonly supplied in forms such as die attach pastes, die attach films, liquid die attach adhesives, preformed die bonding materials, silver sintering materials, and solder-based bonding materials. Key technical requirements include low ionic impurities, low stress, low voiding, controlled bond line thickness, high thermal conductivity, high reliability, rapid curing, and compatibility with packaging processes such as dispensing, printing, placement, and sintering. Their downstream applications cover logic and memory IC packaging, power semiconductor packaging, LED and optoelectronic device packaging, MEMS and sensor packaging, RF and hybrid module packaging, among others. Major customers include outsourced semiconductor assembly and test providers, integrated device manufacturers, power device manufacturers, optoelectronic device manufacturers, and high-reliability electronics manufacturers. With rising demand for automotive electronics, wide-bandgap semiconductors, advanced packaging, and high-power-density modules, die bonding materials are evolving from conventional bonding consumables into core functional materials that affect package thermal performance, yield, lifetime, and overall system reliability.

Die bonding materials are fundamental functional materials that connect semiconductor

dies to package carriers in semiconductor packaging, yet their industrial value has clearly moved beyond that of ordinary bonding consumables. As chip power consumption, package density, and operating temperature continue to rise, the die attach interface must withstand thermal cycling, humidity, mechanical shock, and long-term electrical stress, while also providing heat dissipation, electrical connection, or insulation within a limited bond line thickness. As a result, low voiding, low ionic contamination, low stress, high thermal conductivity, and thickness consistency have become critical variables for package reliability. Traditional conductive and non-conductive epoxy adhesives still serve a large volume of mature packaging demand, while die attach films, dicing die bonding tapes, and silver sintering materials are gaining more opportunities in thin, stacked, and high-power applications. Competition in this industry does not depend simply on the number of material grades, but on formulation stability, process windows, equipment compatibility, customer qualification cycles, and accumulated failure analysis databases. For downstream OSATs and device manufacturers, the selection of die bonding materials directly affects yield, rework risk, thermal resistance, lifetime, and final product qualification, so suppliers that enter core customer systems usually have strong stickiness.

From the perspective of demand structure, the growth drivers for die bonding materials are expanding from mature consumer electronics packaging toward automotive electronics, power semiconductors, advanced packaging, and high-reliability industrial electronics. Traditional logic, memory, LED, and sensor packaging provide a stable base of demand, while SiC, GaN, IGBT, MOSFET, and high-power modules have higher requirements for high thermal conductivity, high temperature resistance, and long-term stability, accelerating the development of silver sintering materials, semi-sintering materials, high-thermal-conductivity conductive adhesives, and high-reliability die attach pastes. Multi-chip, thin-die, and stacked structures in advanced packaging also increase the value of die attach films and tape-based materials, because these materials help control bond line thickness, reduce adhesive bleed, improve die warpage, and enhance consistency in automated production. Downstream customers typically do not compare materials based on price alone, but comprehensively evaluate package structure, die size, substrate type, thermal resistance targets, curing conditions, equipment throughput, and reliability qualification results. In the future, die bonding material suppliers are more likely to cover multiple packaging scenarios through platform-based product portfolios and bind with customers through joint development.

From the perspective of the industry landscape, die bonding materials have clear technical qualification barriers and regional clustering characteristics. Japanese, U.S., and German companies have long-standing accumulation in high-reliability electronic

adhesives, functional films, sintering materials, and semiconductor packaging materials, while Chinese companies are improving local material supply around domestic OSATs, power devices, and automotive electronics supply chains. Since die bonding materials are located between the die and the package carrier, any interface failure may lead to thermal runaway, open circuits, delamination, void expansion, or reduced package lifetime. Therefore, customer introduction cycles are long, and production substitutions are cautious. Future industry opportunities will mainly come from two directions. The first is high-power applications represented by automotive-grade power devices, high-voltage electric drives, photovoltaic inverters, energy storage, and industrial power supplies. The second is high-density applications represented by advanced packaging, sensors, optoelectronic devices, and thin multi-chip structures. As package manufacturing upgrades toward higher yield, lower-temperature processes, lower-carbon production, and longer lifetime qualification, die bonding materials will continue to evolve toward high thermal conductivity, low-temperature curing, low stress, lead-free formulations, low volatility, and high consistency.

This report studies the global Die Bonding Materials production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Die Bonding Materials total production and demand, 2021-2032, (Tons)

Global Die Bonding Materials total production value, 2021-2032, (USD Million)

Global Die Bonding Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Die Bonding Materials consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Die Bonding Materials domestic production, consumption, key domestic manufacturers and share

Global Die Bonding Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Die Bonding Materials production by Material Form, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Die Bonding Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Die Bonding Materials 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 Resonac, Dow, AI Technology, MacDermid Alpha, Henkel, Creative Materials, Hybond, Master Bond, YINCAE Advanced Materials, DELO, 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 Bonding Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Material Form, 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 Bonding Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Die Bonding Materials Market, Segmentation by Material Form:

Die Attach Paste

Die Attach Film

Liquid Die Attach Adhesive

Preformed Die Attach Material

Other

Global Die Bonding Materials Market, Segmentation by Bonding Mechanism:

Thermoset Bonding Material

Silver Sintering Material

Solder-Based Bonding Material

Other

Global Die Bonding Materials Market, Segmentation by Material System:

Epoxy-Based Material

Silicone-Based Material

Polyimide-Based Material

Acrylic-Based Material

Hybrid Resin Material

Global Die Bonding Materials Market, Segmentation by Application:

Logic and Memory IC Packaging

Power Semiconductor Packaging

LED and Optoelectronics Packaging

MEMS and Sensor Packaging

RF and Hybrid Module Packaging

Other

Companies Profiled:

Resonac

Dow

AI Technology

MacDermid Alpha

Henkel

Creative Materials

Hybond

Master Bond

YINCAE Advanced Materials

DELO

NAMICS

Shin-Etsu Chemical

Sumitomo Bakelite

LINTEC

Furukawa Electric

Kyocera

Heraeus Electronics

Tanaka Precious Metals

Inventec Performance Chemicals

Permabond

DuPont

Yongootech

Darbond Technology

Hangzhou Zhijiang Silicone Chemicals

Zhejiang Huasheng Technology

Key Questions Answered:

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

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