

Global Electronic Underfill Encapsulants Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Electronic Underfill Encapsulants market size was valued at US\$ 813 million in 2025 and is forecast to a readjusted size of US\$ 1285 million by 2032 with a CAGR of 6.8% during review period.

Electronic Underfill Encapsulants are liquid or film-type insulating protection materials used in semiconductor packaging and board-level electronic assembly. They are typically based on epoxy or modified epoxy resin systems and formulated with inorganic fillers, curing agents, coupling agents, toughening agents and rheology-control additives. The material is filled into the fine gap between a die, package, solder ball, bump and substrate through capillary flow, dispensing, pre-application, lamination or molding. After curing, it forms a continuous stress-buffering and sealing layer to improve solder-joint resistance to thermal cycling, drop impact, mechanical shock, moisture and long-term reliability stress.

Electronic Underfill Encapsulants are mainly used in flip-chip packages, chip-scale packages, ball grid array packages, wafer-level packages, system-in-package modules, 2.5D and 3D advanced packages, automotive electronics, AI server processors, memory devices, RF devices, sensors and power devices. Major production and R&D bases are concentrated in Japan, the United States, Germany, China, South Korea and Taiwan, China, where electronic chemicals, semiconductor packaging materials and advanced packaging supply chains are relatively mature.

In 2025, global Electronic Underfill Encapsulants production reached approximately 9,300?9,800 metric tons, with mainstream bulk FOB prices at approximately USD 80?86 per kg. Standard board-level capillary flow grades were generally priced below

the market average, while semiconductor-grade, automotive-grade, high-thermal-conductivity, low-warpage and advanced-packaging grades were priced significantly above average.

The global Electronic Underfill Encapsulants market is primarily driven by device miniaturization, higher interconnect density and rising packaging reliability requirements. As flip-chip, BGA, CSP, WLP, SiP, 2.5D and 3D advanced packaging technologies continue to penetrate high-value electronics, solder joints and bump structures are becoming smaller and more vulnerable to thermal expansion mismatch, mechanical shock, drop impact, vibration and moisture-related aging. Electronic Underfill Encapsulants form a stable protective layer within the narrow interconnect gap, redistribute solder-joint stress and extend interconnect lifetime. As a result, they have evolved from a reliability-enhancing material for consumer electronics into a critical packaging material for advanced semiconductors, automotive electronics, AI servers, memory devices and power electronics. Continued growth in AI processors, high-performance computing, vehicle electronic architectures and premium mobile devices will support demand for low-viscosity, fast-curing, low-ion, low-stress, thermally conductive and low-warpage formulations.

Key market challenges include long formulation qualification cycles, high customer certification barriers, raw-material consistency requirements and the fast evolution of advanced packaging processes. Underfill materials must simultaneously meet demanding targets for flow behavior, gap filling, interfacial adhesion, curing shrinkage, coefficient of thermal expansion, glass transition temperature, modulus, ionic impurities and moisture absorption. Improving one parameter often creates trade-offs with flowability, reliability or process window. Downstream customers apply strict requirements for failure rate, void control, warpage and batch consistency, making the entry barrier much higher than that of general electronic adhesives. Future competition will shift from product pricing alone to a broader contest in formulation capability, process compatibility, reliability data, joint development with customers and localized supply assurance. Suppliers with advanced packaging qualifications, automotive-grade certification and proven high-end electronic materials manufacturing experience will be better positioned to capture premium demand.

This report is a detailed and comprehensive analysis for global Electronic Underfill Encapsulants market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets.

Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Electronic Underfill Encapsulants market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Electronic Underfill Encapsulants market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Electronic Underfill Encapsulants market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Electronic Underfill Encapsulants market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Electronic Underfill Encapsulants

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Electronic Underfill Encapsulants market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel AG & Co. KGaA, NAMICS Corporation, Resonac Corporation, Panasonic Industry Co., Ltd., Shin-Etsu Chemical Co., Ltd., Sumitomo Bakelite Co., Ltd., Nagase ChemteX Corporation, Kyocera Corporation, ThreeBond Co., Ltd., H.B. Fuller Company, etc.

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

Market Segmentation

Electronic Underfill Encapsulants market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Capillary Flow Underfill

Molded Underfill

No Flow Underfill

Others

Market segment by Resin Chemistry

Epoxy Based Materials

Modified Epoxy and Hybrid Materials

Others

Market segment by Package Type

Flip Chip Packages

BGA and CSP Packages

WLP and Fan Out Packages

Others

Market segment by End Use Industry

Consumer Electronics

Computing and Communications Infrastructure

Automotive Electronics

Others

Market segment by Application

Package Level Underfill

Board Level Underfill

Others

Major players covered

Henkel AG & Co. KGaA

NAMICS Corporation

Resonac Corporation

Panasonic Industry Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

Sumitomo Bakelite Co., Ltd.

Nagase ChemteX Corporation

Kyocera Corporation

ThreeBond Co., Ltd.

H.B. Fuller Company

Parker Hannifin Corporation

AI Technology, Inc.

Zymet Inc.

Master Bond Inc.

Element Solutions Inc

AIM Solder

DELO Industrial Adhesives

Dr. H?nle AG

Protavic International

ROARTIS bvba

Darbond Technology Co., Ltd.

Weldtone Technology Co., Ltd.

Hubei Huitian New Materials Co., Ltd.

WaferChem Technology Corp.

Everwide Chemical Co.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Electronic Underfill Encapsulants product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Electronic Underfill Encapsulants, with price, sales quantity, revenue, and global market share of Electronic Underfill Encapsulants from 2021 to 2026.

Chapter 3, the Electronic Underfill Encapsulants competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Electronic Underfill Encapsulants breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Electronic Underfill Encapsulants market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Electronic Underfill Encapsulants.

Chapter 14 and 15, to describe Electronic Underfill Encapsulants sales channel, distributors, customers, research findings and conclusion.

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