

Global Epoxy-Based Underfill Materials 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 Epoxy-Based Underfill Materials market size was valued at US\$ 669 million in 2025 and is forecast to a readjusted size of US\$ 1440 million by 2032 with a CAGR of 11.7% during review period.

Epoxy-based underfill materials, also commonly referred to as epoxy underfill adhesive, are high-reliability insulating encapsulation materials used in semiconductor packaging and board-level assembly. They are typically supplied as one-component or pre-formulated heat-curable epoxy systems in liquid or paste form, and after cure they form cross-linked polymer networks. Functional fillers such as silica are often incorporated to optimize coefficient of thermal expansion, flow behavior, mechanical strength, and long-term reliability. These materials fill the narrow gap between the chip and the substrate through capillary action or through no-flow and molded processes, creating stress redistribution and structural reinforcement around solder joints, bumps, and interconnects. Their main product categories include capillary underfill, no-flow underfill, and molded underfill, and their key applications cover flip chip, ball grid array, chip scale package, wafer level chip scale package, advanced packaging, automotive electronics, mobile devices, data center hardware, and high-performance computing.

In 2025, global epoxy-based underfill materials production reached approximately 320 to 520 tons. Based on publicly visible advanced packaging capacity expansion, rising demand from artificial intelligence and high-performance computing related packages, and commercial pricing samples for packaging-grade underfill materials, the representative free-on-board price generally ranged from about US\$900 to US\$2,600 per kilogram in 2025.

The global market for epoxy-based underfill materials is rapidly evolving from a conventional package protection material into a critical reliability enabler for advanced semiconductor packaging. As artificial intelligence training and inference processors, high-bandwidth memory, chiplet architectures, and heterogeneous integration continue to scale, package structures are moving toward larger body sizes, finer pitches, and higher thermal loads. This is raising material requirements for low voiding, fast and uniform flow, low coefficient of thermal expansion, high glass transition temperature, and high cleanliness. TSMC has repeatedly highlighted the importance of advanced packaging and three-dimensional stacking technologies for high-performance computing, and has also indicated that CoWoS has maintained strong growth momentum since 2023 due to AI-driven demand. This means underfill materials are no longer merely conventional assembly materials, but increasingly high-value solutions tightly linked to package design, process compatibility, and customer qualification.

From a commercial perspective, growth is no longer driven solely by consumer electronics. It is increasingly supported by a broader mix of consumer electronics, data center infrastructure, artificial intelligence accelerators, automotive electronics, and high-reliability industrial electronics. In server processors, advanced memory packages, and automotive control modules, underfill materials play a more critical role in thermal cycling endurance, drop performance, and long service life. At the same time, the market faces clear constraints. Finer pitch structures and thinner die designs require a more precise balance among rheology, filler loading, cure profile, flux compatibility, and reworkability. Long qualification cycles, strict consistency requirements, and high process sensitivity mean that competition is centered more on formulation know-how, field application support, and global delivery capability than on simple price competition. As leading packaging and test providers continue to expand advanced packaging capabilities, the next phase of competition will increasingly focus on advanced packaging compatibility, automotive-grade reliability, and ecosystem alignment with leading OSATs, IDMs, and foundries.

This report is a detailed and comprehensive analysis for global Epoxy-Based Underfill Materials 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 Epoxy-Based Underfill Materials market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/kg), 2021-2032

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

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

Global Epoxy-Based Underfill Materials market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/kg), 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 Epoxy-Based Underfill Materials
- 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 Epoxy-Based Underfill Materials 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 Hubei Huitian New Materials Co., Ltd. (????), Darbond Technology Co., Ltd. (darbond.com), Henkel AG & Co. KGaA (henkel.com), Element Solutions Inc (elementsolutionsinc.com), NAMICS Corporation (?????????), Resonac Corporation (resonac.com), Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp), Dexerials Corporation (dexerials.jp), H.B. Fuller Company (hbfuller.com), ThreeBond Co., Ltd. (threebond.co.jp), etc.

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

Market Segmentation

Epoxy-Based Underfill Materials 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

Package Level Underfill

Board Level Underfill

Wafer Level Underfill

Market segment by Form

Liquid

Pre-Molded

Dry Film

Market segment by Curing Technology

Capillary Underfill

No-Flow Underfill

Others

Market segment by Filler Type

Silica-Filled

Nano-Filled

Others

Market segment by Application

Consumer Electronics

Automotive Electronics

Telecommunications And Infrastructure

Defense And Aerospace Electronics

Others

Major players covered

Hubei Huitian New Materials Co., Ltd. (?????)

Darbond Technology Co., Ltd. (darbond.com)

Henkel AG & Co. KGaA (henkel.com)

Element Solutions Inc (elementsolutionsinc.com)

NAMICS Corporation (???????????)

Resonac Corporation (resonac.com)

Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp)

Dexerials Corporation (dexerials.jp)

H.B. Fuller Company (hbfuller.com)

ThreeBond Co., Ltd. (threebond.co.jp)

Hoenle AG (Hoenle)

Zymet, Inc. (zymet.com)

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 Epoxy-Based Underfill Materials product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Epoxy-Based Underfill Materials, with price, sales quantity, revenue, and global market share of Epoxy-Based Underfill Materials from 2021 to 2026.

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

Chapter 4, the Epoxy-Based Underfill Materials 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 Epoxy-Based Underfill Materials 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 Epoxy-Based Underfill Materials.

Chapter 14 and 15, to describe Epoxy-Based Underfill Materials sales channel, distributors, customers, research findings and conclusion.

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