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Global Epoxy Molding Compound (EMC) for Advanced Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Epoxy Molding Compound (EMC) for Advanced Packaging market size is expected to reach $ 1080 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Epoxy molding compounds for advanced packaging are thermosetting composite materials based on epoxy resin, formulated with curing agents, inorganic fillers (such as silica), and additives—including accelerators, coupling agents, mold release agents, flame retardants, and performance modifiers. They are used to encapsulate, fill gaps, or perform molded underfill on wafers, reconstituted wafers, panels, chips, interconnect structures, and packaging substrates via processes such as transfer molding, compression molding, vacuum molding, or film-assisted molding. Their primary functions include providing electrical insulation, mechanical support, protection against moisture and contamination, interconnect protection, and thermomechanical stress management. Furthermore, through designs featuring low warpage, low thermal expansion, low stress, high thermal conductivity, fine fillers, high purity, and high reliability, they meet the packaging requirements of FOWLP, FOPLP, FC-BGA, FC-CSP, SiP, MUF, stacked memory, Chiplets, 2.5D/3D heterogeneous integration, and advanced power modules.

This report focuses on molding materials used directly in FOWLP, FOPLP, flip-chip BGA/CSP, molded underfill (MUF), system-in-package (SiP), high-bandwidth memory (HBM), chiplet packaging, 2.5D/3D integration, and advanced power modules. Compared with conventional EMC, this market has a smaller volume base, but liquid compression molding materials, molded underfill compounds, and film-type products generally command higher unit values. As semiconductor packaging evolves from

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single-die protection toward multi-die system integration, EMC is also transitioning from an external protective material into a critical structural material that directly affects package warpage, interconnect reliability, die shift, mold-flow defects, and overall packaging yield.

From the supply perspective, the global advanced-packaging EMC market remains strongly dominated by Japanese companies. Sumitomo Bakelite, Resonac, Panasonic Industry, NAMICS, Shin-Etsu Chemical, and Kyocera collectively cover multiple product routes, including conventional solid EMC, granular compression molding compounds, molded underfill materials, liquid molding compounds, and sheet-type materials. These suppliers maintain leading positions through long-established formulation expertise, extensive qualification experience with semiconductor packaging customers, and localized manufacturing capabilities across Asia.

From the demand perspective, AI accelerators, high-performance computing, HBM, chiplet architectures, and multi-die heterogeneous integration are expected to represent the primary sources of incremental growth over the next several years. Advanced packaging integrates more logic dies, memory devices, interposers, and interconnect structures within a single package. Larger package dimensions, increased die-stacking levels, and narrower interconnect pitches require molding materials to simultaneously provide low warpage, low stress, fine-gap filling capability, strong adhesion, and high reliability. Industry developments disclosed by SEMI indicate that semiconductor capital expenditure since 2025 has continued to shift toward advanced logic, HBM, and advanced packaging, with AI and high-performance computing becoming major investment drivers for 2.5D, 3D, fan-out, and chiplet technologies. At the same time, vehicle electrification and industrial power electronics are driving SiC, GaN, and highly integrated power modules toward higher junction temperatures and greater power density, creating a separate growth pathway for high-Tg, thermally conductive, and low-stress EMC products.

Report Scope

This report studies the global Epoxy Molding Compound (EMC) for Advanced Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Epoxy Molding Compound (EMC) for Advanced Packaging 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

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Epoxy Molding Compound (EMC) for Advanced Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Epoxy Molding Compound (EMC) for Advanced Packaging total production and demand, 2021-2032, (Tons)

Global Epoxy Molding Compound (EMC) for Advanced Packaging total production value, 2021-2032, (USD Million)

Global Epoxy Molding Compound (EMC) for Advanced Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Epoxy Molding Compound (EMC) for Advanced Packaging consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Epoxy Molding Compound (EMC) for Advanced Packaging domestic production, consumption, key domestic manufacturers and share

Global Epoxy Molding Compound (EMC) for Advanced Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Epoxy Molding Compound (EMC) for Advanced Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Epoxy Molding Compound (EMC) for Advanced Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Epoxy Molding Compound (EMC) for Advanced Packaging 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 Sumitomo Bakelite Co., Ltd., Resonac Corporation, Panasonic Industry Co., Ltd., Samsung SDI Co., Ltd., Henkel AG & Co. KGaA, NAMICS Corporation, KCC Corporation, Shin-Etsu Chemical Co., Ltd., Kyocera Corporation, Jiangsu Zhongke Kehua New Materials Co.,

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Ltd., 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 Epoxy Molding Compound (EMC) for Advanced Packaging 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 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 Epoxy Molding Compound (EMC) for Advanced Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Epoxy Molding Compound (EMC) for Advanced Packaging

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Market, Segmentation by Type:

Liquid Molding Compounds (LMC)

Granular/Powder EMC

Sheet and Film-type EMC

Global Epoxy Molding Compound (EMC) for Advanced Packaging Market, Segmentation by Process:

Transfer Molding Grade

Compression Molding Grade

Sheet and Film Molding Grade

Global Epoxy Molding Compound (EMC) for Advanced Packaging Market, Segmentation by Application:

Fan-Out Wafer-Level Packaging

Fan-Out Panel-Level Packaging

Flip-Chip BGA and CSP Packaging

System-in-Package

2.5D and 3D Integration Packaging

Chiplet Packaging

High Bandwidth Memory and Stacked Memory Packaging

Others

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Companies Profiled:

Sumitomo Bakelite Co., Ltd.

Resonac Corporation

Panasonic Industry Co., Ltd.

Samsung SDI Co., Ltd.

Henkel AG & Co. KGaA

NAMICS Corporation

KCC Corporation

Shin-Etsu Chemical Co., Ltd.

Kyocera Corporation

Jiangsu Zhongke Kehua New Materials Co., Ltd.

Jiangsu HHCK Advanced Materials Co., Ltd.

Eternal Materials Co., Ltd.

Sanyu Rec Co., Ltd.

PhiChem Corporation

WaferChem Technology Corporation

SP Samhwa Co., Ltd.

Key Questions Answered:

1. How big is the global Epoxy Molding Compound (EMC) for Advanced Packaging

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market?
2. What is the demand of the global Epoxy Molding Compound (EMC) for Advanced Packaging market?
3. What is the year over year growth of the global Epoxy Molding Compound (EMC) for Advanced Packaging market?
4. What is the production and production value of the global Epoxy Molding Compound (EMC) for Advanced Packaging market?
5. Who are the key producers in the global Epoxy Molding Compound (EMC) for Advanced Packaging market?
6. What are the growth factors driving the market demand?

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