

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

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Abstracts

The global Epoxy Molding Compound (EMC) for Semiconductor market size is expected to reach \$ 4061 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Epoxy molding compound for semiconductors is a thermosetting composite encapsulation material used in semiconductor back-end packaging. It is mainly applied to form a stable protective layer around chips, lead frames, package substrates, bonding wires, bumps, or module structures, addressing reliability issues caused by humid heat, mechanical shock, contamination, ion migration, thermal cycling, and long-term operating heat. These products typically use epoxy resin and phenolic resin curing systems as the main matrix, combined with silica filler, alumina, carbon black, flame retardants, coupling agents, release agents, stress modifiers, and flow-control additives. Through compounding, grinding, granulation, sheet formation, or liquid formulation design, they are supplied in granular, powder, sheet, and liquid forms, and are compatible with transfer molding, compression molding, liquid compression molding, mold underfill, and wafer-level packaging processes. Their core functions include chip protection, moisture resistance, electrical insulation, heat dissipation, dimensional stability, low warpage, low stress, high heat resistance, high breakdown voltage, and fine-gap filling. Typical applications cover logic chips, memory devices, discrete devices, power modules, optical semiconductors, sensors, MEMS, BGA, CSP, QFN, FOWLP, FOPLP, and SiP packaging. Major customers include outsourced semiconductor assembly and test providers, foundries, IDMs, power device manufacturers, memory manufacturers, and automotive electronics supply-chain companies.

Epoxy molding compound for semiconductors has evolved from a conventional back-

end packaging auxiliary material into a critical functional material that affects package reliability, thermal management, and advanced packaging yield. As chips become thinner, package structures become slimmer, I/O density increases, and system integration rises, EMC is no longer merely an external protective layer. It must simultaneously provide moisture resistance, electrical insulation, mechanical support, low-stress control, low-warpage management, heat dissipation, environmentally compliant flame retardancy, and long-term reliability. Traditional lead-frame packages continue to provide stable demand for EMC, while BGA, CSP, QFN, power modules, and automotive-grade devices keep raising material performance thresholds. Advanced packaging further requires finer fillers, higher flowability, lower CTE, stronger interfacial adhesion, and shorter curing cycles, making granular EMC, sheet EMC, liquid molding compounds, and liquid compression molding materials common directions for product upgrading. Future industry growth will come not only from semiconductor shipment recovery, but also from higher material value per device, advanced packaging material substitution, the expansion of highly reliable power device packaging, and stronger supply-chain stickiness created by automotive qualification cycles.

The global competitive landscape shows a structure in which Japan leads in high-end technologies, Korea is supported by memory and integrated materials ecosystems, and mainland China and China Taiwan are accelerating their catch-up. Japanese companies have deep accumulated expertise in EMC and cover general packages, substrate packages, power modules, sensors, wafer-level packages, and liquid molding materials, with a relatively complete technology spectrum in low stress, low warpage, high thermal conductivity, high heat resistance, and halogen-free, antimony-free systems. Korean companies benefit from memory, foundry, and electronic materials platforms and have customer-introduction advantages in DRAM, NAND, foundry, and multi-scenario semiconductor packaging materials. China Taiwan companies have product coverage in ICs, diodes, transistors, photocouplers, liquid molding, and advanced packaging materials. Mainland Chinese companies are benefiting from the expansion of the OSAT industry, import substitution, automotive electronics, and power semiconductors, and are upgrading from basic and mid-range products toward high-end, advanced packaging, and high-thermal-conductivity materials. Because EMC requires long customer qualification cycles, formulation databases, batch stability, ionic impurity control, and failure-analysis capability, industry entry barriers are high. Once leading customers complete qualification and switching, supply relationships are usually relatively durable.

The future market for semiconductor EMC will be driven by advanced packaging, automotive electronics, AI computing, power devices, and supply-chain security. AI

servers, data centers, and high-performance computing are driving growth in high-density packaging, memory devices, and system-in-package demand, requiring materials with lower warpage, higher reliability, and better fine-gap filling capability. New energy vehicles, photovoltaic inverters, energy storage, industrial control, and rail transportation are increasing demand for power modules and discrete devices, supporting volume growth in high-thermal-conductivity, high-heat-resistance, high-breakdown-voltage, and moisture-resistant products. Smartphones, wearable devices, sensors, and optoelectronic devices will continue to require miniaturized, thin, and optically functional encapsulation materials. Policy direction and supply-chain security will continue to support regional localization, especially creating a clear import-substitution window for semiconductor packaging materials in mainland China. Overall, the EMC industry retains solid medium- to long-term growth potential. Although short-term demand may be affected by semiconductor cycles and consumer electronics volatility, advanced packaging upgrades and the expansion of automotive-grade power devices will raise the average technology content and material price, shifting competition from capacity expansion toward formulation capability, customer qualification capability, and high-end product portfolio strength.

This report studies the global Epoxy Molding Compound (EMC) for Semiconductor 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 Semiconductor 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 Epoxy Molding Compound (EMC) for Semiconductor that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Epoxy Molding Compound (EMC) for Semiconductor total production and demand, 2021-2032, (MT)

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

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

Global Epoxy Molding Compound (EMC) for Semiconductor consumption by region & country, CAGR, 2021-2032 & (MT)

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

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

Global Epoxy Molding Compound (EMC) for Semiconductor production by Product Form, production, value, CAGR, 2021-2032, (USD Million) & (MT)

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

This report profiles key players in the global Epoxy Molding Compound (EMC) for Semiconductor 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, KYOCERA Corporation, Panasonic Industry Co., Ltd., Shin-Etsu Chemical Co., Ltd., NAGASE ChemteX Corporation, NAMICS Corporation, Nitto Denko Corporation, KCC Corporation, Samsung SDI Co., 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 Semiconductor market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (US\$/MT) by manufacturer, by Product 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 Epoxy Molding Compound (EMC) for Semiconductor Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Epoxy Molding Compound (EMC) for Semiconductor Market, Segmentation by Product Form:

Granules

Sheet

Liquid

Powder

Global Epoxy Molding Compound (EMC) for Semiconductor Market, Segmentation by Color:

Black

White

Transparent

Global Epoxy Molding Compound (EMC) for Semiconductor Market, Segmentation by Environmental System:

Halogen-Containing

Halogen-Free

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

Logic and General Integrated Circuit Packaging

Memory Device Packaging

Discrete Device Packaging

Other

Companies Profiled:

Sumitomo Bakelite Co., Ltd.

Resonac Corporation

KYOCERA Corporation

Panasonic Industry Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

NAGASE ChemteX Corporation

NAMICS Corporation

Nitto Denko Corporation

KCC Corporation

Samsung SDI Co., Ltd.

Chang Chun Group

Eternal Materials Co., Ltd.

Jiangsu HHCK Advanced Materials Co., Ltd.

Scienchem

Tianjin Kaihua Insulating Material Co., Ltd.

Henkel AG & Co. KGaA

Key Questions Answered:

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

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