

Global Epoxy Resin for Semiconductor Packaging Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Epoxy Resin for Semiconductor Packaging market size is expected to reach \$ 1392 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Epoxy Resin for Semiconductor Packaging refers to high-purity epoxy resin raw materials engineered for the encapsulation, protection, bonding and insulation of semiconductor devices. Supplied as solid, crystalline or high-purity liquid grades, these resins are formulated with curing agents, silica fillers and functional additives to manufacture epoxy molding compounds, underfills, die-attach materials and other packaging materials. Major structures include cresol novolac, phenol novolac, biphenyl, crystalline, multifunctional, phenol-aralkyl and naphthalene epoxy resins. Key specifications include epoxy equivalent weight, melt or liquid viscosity, hydrolyzable chlorine, ionic impurities, glass-transition temperature, moisture absorption, thermal expansion, filler-loading capability, adhesion and curing behavior. This research focuses on epoxy resin raw materials specifically manufactured and quality-controlled for semiconductor packaging.

Key Findings

Global production reached approximately 170,000 tons in 2025

Average selling price was approximately US\$5,000 per ton in 2025

Average capacity utilization was approximately 80% in 2025

Average gross margin was approximately 30% in 2025

Market Trends

Epoxy Resin for Semiconductor Packaging is developing toward higher purity, lower hydrolyzable chlorine and ionic impurities, lower viscosity, higher filler loading and improved thermal reliability. Epoxy molding compounds require resin systems with low melt viscosity, low moisture absorption and low thermal expansion to reduce package cracking, delamination and warpage. Underfill and die-attach applications place greater emphasis on flowability, adhesion, toughness and compatibility with fine-pitch interconnects. Chiplets, fan-out packaging, 2.5D and 3D integration, high-bandwidth memory and larger package sizes are raising requirements for warpage control and thermal cycling reliability. Crystalline, biphenyl, multifunctional, phenol-aralkyl and naphthalene structures are gaining importance as packaging materials move toward thinner, larger and more highly integrated formats.

Market Dynamics

Drivers

Semiconductor content growth, advanced packaging adoption and increasing demand for AI accelerators, high-bandwidth memory, automotive chips and power semiconductors are the main drivers. Larger packages and finer interconnects require epoxy resins with lower CTE, lower moisture absorption and stronger adhesion. Expansion of semiconductor production also increases demand for conventional encapsulation materials.

Restraints

Semiconductor-grade epoxy resin requires high-purity feedstocks, specialized synthesis, molecular distillation and strict contamination control. Performance improvements can raise manufacturing costs and may create trade-offs among viscosity, heat resistance, toughness and curing speed. Long customer qualification cycles limit the speed of new-grade commercialization.

Opportunities

Chiplet integration, fan-out packaging, 2.5D and 3D packages, high-bandwidth memory and automotive power modules provide major opportunities. High-purity resins combining low viscosity, high filler loading, low warpage and strong thermal reliability can enter higher-value packaging applications. Localized semiconductor-material supply provides additional opportunities for regional manufacturers.

Challenges

The principal challenge is maintaining extremely low impurity levels and stable molecular characteristics across production batches. Resin suppliers must support different curing agents, filler systems and molding processes while meeting long-term reliability requirements. Rapid packaging-architecture changes also require closer joint development with compound and packaging-material manufacturers.

Industry Chain Analysis

The upstream industry supplies epichlorohydrin, cresols, phenol, bisphenol compounds, biphenyl and naphthalene intermediates, specialty monomers and purification materials. Midstream manufacturers conduct molecular design, epoxy synthesis, purification, crystallization and quality control to produce solid, crystalline and high-purity liquid resins. Downstream formulators combine these products with phenolic curing agents, silica fillers, accelerators, toughening agents and other additives to manufacture epoxy molding compounds, underfills, die-attach materials and other packaging formulations. Semiconductor packaging companies use these materials to protect chips and interconnections from moisture, mechanical stress, thermal cycling and electrical contamination. Value creation is concentrated in molecular design, chlorine and ion control, viscosity optimization, batch consistency and application support.

Segment Insights

The original classification by brominated, halogen-free and phosphorus-containing products is more appropriate for flame-retardant electronic laminates and contains category overlap. Epoxy Resin for Semiconductor Packaging is better classified by molecular structure into cresol and phenol novolac epoxy resin, biphenyl and crystalline epoxy resin, multifunctional epoxy resin, phenol-aralkyl and naphthalene epoxy resin,

and other specialty epoxy resin.

Cresol novolac products provide high heat resistance and established processing performance for conventional epoxy molding compounds. Biphenyl and crystalline grades offer low melt viscosity and support high silica loading, helping reduce thermal expansion and moisture absorption. Multifunctional products improve crosslink density and heat resistance, while phenol-aralkyl and naphthalene structures support low moisture absorption, adhesion and package reliability. High-purity liquid BPA and BPF grades are more suitable for underfills, liquid encapsulants and adhesive formulations.

Downstream Market Opportunities

Epoxy molding compounds represent the principal application because they are widely used to encapsulate discrete devices, integrated circuits, power semiconductors and advanced packages. Underfill materials provide additional demand in flip-chip, wafer-level and fine-pitch packages by reducing thermomechanical stress between the chip and substrate. Die-attach materials use epoxy resin for chip bonding and thermal-mechanical reliability. Other opportunities include liquid encapsulants, glob-top materials, wafer-level packaging materials and semiconductor insulating adhesives.

Regional Insights

Asia-Pacific is the largest production and consumption region because semiconductor packaging and testing capacity is concentrated in China, Japan, South Korea, Taiwan and Southeast Asia. Japan maintains advantages in high-purity resin synthesis and specialized molecular structures, while Taiwan and South Korea benefit from advanced semiconductor and memory packaging supply chains. China is expanding packaging capacity and increasing local production of semiconductor materials. North America remains important in advanced computing and packaging technology, while Europe generates demand from automotive, industrial and power semiconductor applications.

Competitive Landscape Analysis

The Epoxy Resin for Semiconductor Packaging market includes integrated epoxy manufacturers and specialized electronic-material suppliers. Mainstream products compete on cost, capacity, delivery and molding stability, while advanced grades

compete on purity, chlorine control, melt viscosity, filler-loading capability, low warpage and long-term reliability. Qualification is closely linked to specific molding compounds, package structures and customer processes, creating high technical barriers and switching costs. Future competitiveness will increasingly depend on consistent mass production, rapid grade customization and joint development for advanced packaging, high-bandwidth memory and automotive semiconductors.

Report Scope

This report studies the global Epoxy Resin for Semiconductor Packaging production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Epoxy Resin for Semiconductor 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 Epoxy Resin for Semiconductor Packaging that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Epoxy Resin for Semiconductor Packaging total production and demand, 2021-2032, (Tons)

Global Epoxy Resin for Semiconductor Packaging total production value, 2021-2032, (USD Million)

Global Epoxy Resin for Semiconductor Packaging production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Epoxy Resin for Semiconductor Packaging consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Epoxy Resin for Semiconductor Packaging domestic production, consumption, key domestic manufacturers and share

Global Epoxy Resin for Semiconductor Packaging production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Epoxy Resin for Semiconductor Packaging production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Epoxy Resin for Semiconductor Packaging production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Epoxy Resin for Semiconductor 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 Olin Corporation (USA), Westlake Corporation (USA), Nan Ya Plastics (Taiwan), Chang Chun Group (Taiwan), KUKDO Chemical (South Korea), Kumho P&B Chemicals (South Korea), Mitsubishi Chemical Corporation (Japan), NIPPON STEEL Chemical & Material (Japan), DIC Corporation (Japan), Nippon Kayaku (Japan), 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 Resin for Semiconductor 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 Resin for Semiconductor Packaging Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Epoxy Resin for Semiconductor Packaging Market, Segmentation by Type:

Brominated Epoxy Resin

Halogen-free Epoxy Resin

Phosphorus-containing Epoxy Resin

Others

Global Epoxy Resin for Semiconductor Packaging Market, Segmentation by Tg:

Tg<150°C

150°C?Tg?200°C

Tg>200°C

Global Epoxy Resin for Semiconductor Packaging Market, Segmentation by Dk:

Dk<3

3?Dk<4

Dk>4

Global Epoxy Resin for Semiconductor Packaging Market, Segmentation by Application:

Epoxy Molding Compounds

Underfill Materials

Others

Companies Profiled:

Olin Corporation (USA)

Westlake Corporation (USA)

Nan Ya Plastics (Taiwan)

Chang Chun Group (Taiwan)

KUKDO Chemical (South Korea)

Kumho P&B Chemicals (South Korea)

Mitsubishi Chemical Corporation (Japan)

NIPPON STEEL Chemical & Material (Japan)

DIC Corporation (Japan)

Nippon Kayaku (Japan)

ADEKA Corporation (Japan)

Huntsman Advanced Materials (USA)

Aditya Birla Advanced Materials (India)

Grace Epoxy (China)

Dongcai Technology (China)

Shengquan Group (China)

Key Questions Answered

1. How big is the global Epoxy Resin for Semiconductor Packaging market?
2. What is the demand of the global Epoxy Resin for Semiconductor Packaging market?
3. What is the year over year growth of the global Epoxy Resin for Semiconductor Packaging market?
4. What is the total value of the global Epoxy Resin for Semiconductor Packaging market?
5. Who are the Major Players in the global Epoxy Resin for Semiconductor Packaging market?
6. What are the growth factors driving the market demand?

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