

# Global Epoxy Resin Underfill Adhesive Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Epoxy Resin Underfill Adhesive market size is expected to reach \$ 1440 million by 2032, rising at a market growth of 11.7% CAGR during the forecast period (2026-2032).

Epoxy resin underfill adhesive is a high-reliability insulating encapsulation material used in semiconductor packaging and board-level assembly. It is typically supplied as a one-component or pre-formulated heat-curable epoxy system in liquid or paste form, and after cure it forms a cross-linked polymer network. Functional fillers such as silica are often incorporated to optimize coefficient of thermal expansion, flow behavior, mechanical strength, and long-term reliability. The material fills 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. Its main product categories include capillary underfill, no-flow underfill, and molded underfill, and its key applications cover flip chip, ball grid array, wafer level chip scale package, flexible substrate packaging, advanced packaging, automotive electronics, mobile devices, data center hardware, and high-performance computing.

In 2025, global epoxy resin underfill adhesive production reached approximately 360 to 480 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\$1,100 to US\$2,200 per kilogram in 2025.

The global epoxy underfill adhesive market is moving rapidly from a conventional

package protection material toward a critical reliability enabler for advanced semiconductor packaging. As AI training and inference processors, high bandwidth memory, chiplet architectures, and heterogeneous integration continue to scale, package structures are shifting toward larger body sizes, finer pitches, and higher thermal loads. This is raising material requirements for low voiding, fast and uniform flow, low CTE, high glass transition temperature, and high cleanliness. TSMC has repeatedly highlighted the importance of CoWoS, InFO, and SoIC for AI and high performance computing, while also indicating that CoWoS has enjoyed strong growth momentum since 2023 due to AI driven demand. Amkor and ASE have also continued to emphasize advanced packaging investment, capacity expansion, and penetration into high end applications, reinforcing the view that underfill has become a high value material solution closely tied to package design, process compatibility, and customer qualification.

From a commercial perspective, growth is no longer driven solely by consumer electronics upgrades. It is increasingly supported by a broader combination of consumer electronics, data center infrastructure, AI accelerators, automotive electronics, and high reliability industrial electronics. In server processors, advanced memory packaging, and automotive control modules, underfill plays 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 Chinese suppliers continue to push domestic substitution in chip level underfill and international suppliers launch new materials for AI and HPC packages, 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 studies the global Epoxy Resin Underfill Adhesive production, demand, key manufacturers, and key regions.

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

### **Highlights and key features of the study**

Global Epoxy Resin Underfill Adhesive total production and demand, 2021-2032, (Tons)

Global Epoxy Resin Underfill Adhesive total production value, 2021-2032, (USD Million)

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

Global Epoxy Resin Underfill Adhesive consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Epoxy Resin Underfill Adhesive domestic production, consumption, key domestic manufacturers and share

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

Global Epoxy Resin Underfill Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Epoxy Resin Underfill Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Epoxy Resin Underfill Adhesive 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Epoxy Resin Underfill Adhesive market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) 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 Underfill Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Epoxy Resin Underfill Adhesive Market, Segmentation by Type:

Package Level Underfill

Board Level Underfill

Wafer Level Underfill

## Global Epoxy Resin Underfill Adhesive Market, Segmentation by Form:

Liquid

Pre-Molded

Dry Film

## Global Epoxy Resin Underfill Adhesive Market, Segmentation by Curing Technology:

Capillary Underfill

No-Flow Underfill

Others

Global Epoxy Resin Underfill Adhesive Market, Segmentation by Filler Type:

Silica-Filled

Nano-Filled

Others

Global Epoxy Resin Underfill Adhesive Market, Segmentation by Application:

Consumer Electronics

Automotive Electronics

Telecommunications And Infrastructure

Defense And Aerospace Electronics

Others

Companies Profiled:

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)

**Key Questions Answered:**

1. How big is the global Epoxy Resin Underfill Adhesive market?
2. What is the demand of the global Epoxy Resin Underfill Adhesive market?
3. What is the year over year growth of the global Epoxy Resin Underfill Adhesive market?
4. What is the production and production value of the global Epoxy Resin Underfill Adhesive market?
5. Who are the key producers in the global Epoxy Resin Underfill Adhesive market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Epoxy Resin Underfill Adhesive Introduction
- 1.2 World Epoxy Resin Underfill Adhesive Supply & Forecast
  - 1.2.1 World Epoxy Resin Underfill Adhesive Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Epoxy Resin Underfill Adhesive Production (2021-2032)
  - 1.2.3 World Epoxy Resin Underfill Adhesive Pricing Trends (2021-2032)
- 1.3 World Epoxy Resin Underfill Adhesive Production by Region (Based on Production Site)
  - 1.3.1 World Epoxy Resin Underfill Adhesive Production Value by Region (2021-2032)
  - 1.3.2 World Epoxy Resin Underfill Adhesive Production by Region (2021-2032)
  - 1.3.3 World Epoxy Resin Underfill Adhesive Average Price by Region (2021-2032)
  - 1.3.4 North America Epoxy Resin Underfill Adhesive Production (2021-2032)
  - 1.3.5 Europe Epoxy Resin Underfill Adhesive Production (2021-2032)
  - 1.3.6 China Epoxy Resin Underfill Adhesive Production (2021-2032)
  - 1.3.7 Japan Epoxy Resin Underfill Adhesive Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Epoxy Resin Underfill Adhesive Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Epoxy Resin Underfill Adhesive Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Epoxy Resin Underfill Adhesive Demand (2021-2032)
- 2.2 World Epoxy Resin Underfill Adhesive Consumption by Region
  - 2.2.1 World Epoxy Resin Underfill Adhesive Consumption by Region (2021-2026)
  - 2.2.2 World Epoxy Resin Underfill Adhesive Consumption Forecast by Region (2027-2032)
- 2.3 United States Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.4 China Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.5 Europe Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.6 Japan Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.7 South Korea Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.8 ASEAN Epoxy Resin Underfill Adhesive Consumption (2021-2032)
- 2.9 India Epoxy Resin Underfill Adhesive Consumption (2021-2032)

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Epoxy Resin Underfill Adhesive Production Value by Manufacturer (2021-2026)
- 3.2 World Epoxy Resin Underfill Adhesive Production by Manufacturer (2021-2026)
- 3.3 World Epoxy Resin Underfill Adhesive Average Price by Manufacturer (2021-2026)
- 3.4 Epoxy Resin Underfill Adhesive Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
  - 3.5.1 Global Epoxy Resin Underfill Adhesive Industry Rank of Major Manufacturers
  - 3.5.2 Global Concentration Ratios (CR4) for Epoxy Resin Underfill Adhesive in 2025
  - 3.5.3 Global Concentration Ratios (CR8) for Epoxy Resin Underfill Adhesive in 2025
- 3.6 Epoxy Resin Underfill Adhesive Market: Overall Company Footprint Analysis
  - 3.6.1 Epoxy Resin Underfill Adhesive Market: Region Footprint
  - 3.6.2 Epoxy Resin Underfill Adhesive Market: Company Product Type Footprint
  - 3.6.3 Epoxy Resin Underfill Adhesive Market: Company Product Application Footprint
- 3.7 Competitive Environment
  - 3.7.1 Historical Structure of the Industry
  - 3.7.2 Barriers of Market Entry
  - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

- 4.1 United States VS China: Epoxy Resin Underfill Adhesive Production Value Comparison
  - 4.1.1 United States VS China: Epoxy Resin Underfill Adhesive Production Value Comparison (2021 & 2025 & 2032)
  - 4.1.2 United States VS China: Epoxy Resin Underfill Adhesive Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Epoxy Resin Underfill Adhesive Production Comparison
  - 4.2.1 United States VS China: Epoxy Resin Underfill Adhesive Production Comparison (2021 & 2025 & 2032)
  - 4.2.2 United States VS China: Epoxy Resin Underfill Adhesive Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Epoxy Resin Underfill Adhesive Consumption Comparison
  - 4.3.1 United States VS China: Epoxy Resin Underfill Adhesive Consumption Comparison (2021 & 2025 & 2032)
  - 4.3.2 United States VS China: Epoxy Resin Underfill Adhesive Consumption Market Share Comparison (2021 & 2025 & 2032)

#### 4.4 United States Based Epoxy Resin Underfill Adhesive Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Epoxy Resin Underfill Adhesive Production Value (2021-2026)

4.4.3 United States Based Manufacturers Epoxy Resin Underfill Adhesive Production (2021-2026)

#### 4.5 China Based Epoxy Resin Underfill Adhesive Manufacturers and Market Share

4.5.1 China Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Epoxy Resin Underfill Adhesive Production Value (2021-2026)

4.5.3 China Based Manufacturers Epoxy Resin Underfill Adhesive Production (2021-2026)

#### 4.6 Rest of World Based Epoxy Resin Underfill Adhesive Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production (2021-2026)

### **5 MARKET ANALYSIS BY TYPE**

#### 5.1 World Epoxy Resin Underfill Adhesive Market Size Overview by Type: 2021 VS 2025 VS 2032

#### 5.2 Segment Introduction by Type

5.2.1 Package Level Underfill

5.2.2 Board Level Underfill

5.2.3 Wafer Level Underfill

#### 5.3 Market Segment by Type

5.3.1 World Epoxy Resin Underfill Adhesive Production by Type (2021-2032)

5.3.2 World Epoxy Resin Underfill Adhesive Production Value by Type (2021-2032)

5.3.3 World Epoxy Resin Underfill Adhesive Average Price by Type (2021-2032)

### **6 MARKET ANALYSIS BY FORM**

6.1 World Epoxy Resin Underfill Adhesive Market Size Overview by Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Form

6.2.1 Liquid

6.2.2 Pre-Molded

6.2.3 Dry Film

6.3 Market Segment by Form

6.3.1 World Epoxy Resin Underfill Adhesive Production by Form (2021-2032)

6.3.2 World Epoxy Resin Underfill Adhesive Production Value by Form (2021-2032)

6.3.3 World Epoxy Resin Underfill Adhesive Average Price by Form (2021-2032)

## **7 MARKET ANALYSIS BY CURING TECHNOLOGY**

7.1 World Epoxy Resin Underfill Adhesive Market Size Overview by Curing Technology: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Curing Technology

7.2.1 Capillary Underfill

7.2.2 No-Flow Underfill

7.2.3 Others

7.3 Market Segment by Curing Technology

7.3.1 World Epoxy Resin Underfill Adhesive Production by Curing Technology (2021-2032)

7.3.2 World Epoxy Resin Underfill Adhesive Production Value by Curing Technology (2021-2032)

7.3.3 World Epoxy Resin Underfill Adhesive Average Price by Curing Technology (2021-2032)

## **8 MARKET ANALYSIS BY FILLER TYPE**

8.1 World Epoxy Resin Underfill Adhesive Market Size Overview by Filler Type: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Filler Type

8.2.1 Silica-Filled

8.2.2 Nano-Filled

8.2.3 Others

8.3 Market Segment by Filler Type

8.3.1 World Epoxy Resin Underfill Adhesive Production by Filler Type (2021-2032)

8.3.2 World Epoxy Resin Underfill Adhesive Production Value by Filler Type (2021-2032)

### 8.3.3 World Epoxy Resin Underfill Adhesive Average Price by Filler Type (2021-2032)

## 9 MARKET ANALYSIS BY APPLICATION

### 9.1 World Epoxy Resin Underfill Adhesive Market Size Overview by Application: 2021 VS 2025 VS 2032

#### 9.2 Segment Introduction by Application

##### 9.2.1 Consumer Electronics

##### 9.2.2 Automotive Electronics

##### 9.2.3 Telecommunications And Infrastructure

##### 9.2.4 Defense And Aerospace Electronics

##### 9.2.5 Others

#### 9.3 Market Segment by Application

##### 9.3.1 World Epoxy Resin Underfill Adhesive Production by Application (2021-2032)

##### 9.3.2 World Epoxy Resin Underfill Adhesive Production Value by Application (2021-2032)

##### 9.3.3 World Epoxy Resin Underfill Adhesive Average Price by Application (2021-2032)

## 10 COMPANY PROFILES

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

#### 10.1.1 Hubei Huitian New Materials Co., Ltd. (????) Details

#### 10.1.2 Hubei Huitian New Materials Co., Ltd. (????) Major Business

#### 10.1.3 Hubei Huitian New Materials Co., Ltd. (????) Epoxy Resin Underfill Adhesive Product and Services

#### 10.1.4 Hubei Huitian New Materials Co., Ltd. (????) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.1.5 Hubei Huitian New Materials Co., Ltd. (????) Recent Developments/Updates

#### 10.1.6 Hubei Huitian New Materials Co., Ltd. (????) Competitive Strengths & Weaknesses

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

#### 10.2.1 Darbond Technology Co., Ltd. (darbond.com) Details

#### 10.2.2 Darbond Technology Co., Ltd. (darbond.com) Major Business

#### 10.2.3 Darbond Technology Co., Ltd. (darbond.com) Epoxy Resin Underfill Adhesive Product and Services

#### 10.2.4 Darbond Technology Co., Ltd. (darbond.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

#### 10.2.5 Darbond Technology Co., Ltd. (darbond.com) Recent Developments/Updates

#### 10.2.6 Darbond Technology Co., Ltd. (darbond.com) Competitive Strengths &

## Weaknesses

### 10.3 Henkel AG & Co. KGaA (henkel.com)

10.3.1 Henkel AG & Co. KGaA (henkel.com) Details

10.3.2 Henkel AG & Co. KGaA (henkel.com) Major Business

10.3.3 Henkel AG & Co. KGaA (henkel.com) Epoxy Resin Underfill Adhesive Product and Services

10.3.4 Henkel AG & Co. KGaA (henkel.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Henkel AG & Co. KGaA (henkel.com) Recent Developments/Updates

10.3.6 Henkel AG & Co. KGaA (henkel.com) Competitive Strengths & Weaknesses

### 10.4 Element Solutions Inc (elementsolutionsinc.com)

10.4.1 Element Solutions Inc (elementsolutionsinc.com) Details

10.4.2 Element Solutions Inc (elementsolutionsinc.com) Major Business

10.4.3 Element Solutions Inc (elementsolutionsinc.com) Epoxy Resin Underfill Adhesive Product and Services

10.4.4 Element Solutions Inc (elementsolutionsinc.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 Element Solutions Inc (elementsolutionsinc.com) Recent Developments/Updates

10.4.6 Element Solutions Inc (elementsolutionsinc.com) Competitive Strengths & Weaknesses

### 10.5 NAMICS Corporation (???????????)

10.5.1 NAMICS Corporation (???????????) Details

10.5.2 NAMICS Corporation (???????????) Major Business

10.5.3 NAMICS Corporation (???????????) Epoxy Resin Underfill Adhesive Product and Services

10.5.4 NAMICS Corporation (???????????) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 NAMICS Corporation (???????????) Recent Developments/Updates

10.5.6 NAMICS Corporation (???????????) Competitive Strengths & Weaknesses

### 10.6 Resonac Corporation (resonac.com)

10.6.1 Resonac Corporation (resonac.com) Details

10.6.2 Resonac Corporation (resonac.com) Major Business

10.6.3 Resonac Corporation (resonac.com) Epoxy Resin Underfill Adhesive Product and Services

10.6.4 Resonac Corporation (resonac.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.6.5 Resonac Corporation (resonac.com) Recent Developments/Updates

10.6.6 Resonac Corporation (resonac.com) Competitive Strengths & Weaknesses

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

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

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

10.7.3 Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Epoxy Resin Underfill Adhesive Product and Services

10.7.4 Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.7.5 Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Recent Developments/Updates

10.7.6 Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Competitive Strengths & Weaknesses

## 10.8 Dexerials Corporation (dexerials.jp)

10.8.1 Dexerials Corporation (dexerials.jp) Details

10.8.2 Dexerials Corporation (dexerials.jp) Major Business

10.8.3 Dexerials Corporation (dexerials.jp) Epoxy Resin Underfill Adhesive Product and Services

10.8.4 Dexerials Corporation (dexerials.jp) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.8.5 Dexerials Corporation (dexerials.jp) Recent Developments/Updates

10.8.6 Dexerials Corporation (dexerials.jp) Competitive Strengths & Weaknesses

## 10.9 H.B. Fuller Company (hbfuller.com)

10.9.1 H.B. Fuller Company (hbfuller.com) Details

10.9.2 H.B. Fuller Company (hbfuller.com) Major Business

10.9.3 H.B. Fuller Company (hbfuller.com) Epoxy Resin Underfill Adhesive Product and Services

10.9.4 H.B. Fuller Company (hbfuller.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.9.5 H.B. Fuller Company (hbfuller.com) Recent Developments/Updates

10.9.6 H.B. Fuller Company (hbfuller.com) Competitive Strengths & Weaknesses

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

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

10.10.2 ThreeBond Co., Ltd. (threebond.co.jp) Major Business

10.10.3 ThreeBond Co., Ltd. (threebond.co.jp) Epoxy Resin Underfill Adhesive Product and Services

10.10.4 ThreeBond Co., Ltd. (threebond.co.jp) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 ThreeBond Co., Ltd. (threebond.co.jp) Recent Developments/Updates

10.10.6 ThreeBond Co., Ltd. (threebond.co.jp) Competitive Strengths & Weaknesses

## 10.11 Hoenle AG (Hoenle)

10.11.1 Hoenle AG (Hoenle) Details

- 10.11.2 Hoenle AG (Hoenle) Major Business
- 10.11.3 Hoenle AG (Hoenle) Epoxy Resin Underfill Adhesive Product and Services
- 10.11.4 Hoenle AG (Hoenle) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.11.5 Hoenle AG (Hoenle) Recent Developments/Updates
- 10.11.6 Hoenle AG (Hoenle) Competitive Strengths & Weaknesses
- 10.12 Zymet, Inc. (zymet.com)
  - 10.12.1 Zymet, Inc. (zymet.com) Details
  - 10.12.2 Zymet, Inc. (zymet.com) Major Business
  - 10.12.3 Zymet, Inc. (zymet.com) Epoxy Resin Underfill Adhesive Product and Services
  - 10.12.4 Zymet, Inc. (zymet.com) Epoxy Resin Underfill Adhesive Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 10.12.5 Zymet, Inc. (zymet.com) Recent Developments/Updates
  - 10.12.6 Zymet, Inc. (zymet.com) Competitive Strengths & Weaknesses

## **11 INDUSTRY CHAIN ANALYSIS**

- 11.1 Epoxy Resin Underfill Adhesive Industry Chain
- 11.2 Epoxy Resin Underfill Adhesive Upstream Analysis
  - 11.2.1 Epoxy Resin Underfill Adhesive Core Raw Materials
  - 11.2.2 Main Manufacturers of Epoxy Resin Underfill Adhesive Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Epoxy Resin Underfill Adhesive Production Mode
- 11.6 Epoxy Resin Underfill Adhesive Procurement Model
- 11.7 Epoxy Resin Underfill Adhesive Industry Sales Model and Sales Channels
  - 11.7.1 Epoxy Resin Underfill Adhesive Sales Model
  - 11.7.2 Epoxy Resin Underfill Adhesive Typical Distributors

## **12 RESEARCH FINDINGS AND CONCLUSION**

## **13 APPENDIX**

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Epoxy Resin Underfill Adhesive Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Epoxy Resin Underfill Adhesive Production Value by Region (2021-2026) & (USD Million)

Table 3. World Epoxy Resin Underfill Adhesive Production Value by Region (2027-2032) & (USD Million)

Table 4. World Epoxy Resin Underfill Adhesive Production Value Market Share by Region (2021-2026)

Table 5. World Epoxy Resin Underfill Adhesive Production Value Market Share by Region (2027-2032)

Table 6. World Epoxy Resin Underfill Adhesive Production by Region (2021-2026) & (Tons)

Table 7. World Epoxy Resin Underfill Adhesive Production by Region (2027-2032) & (Tons)

Table 8. World Epoxy Resin Underfill Adhesive Production Market Share by Region (2021-2026)

Table 9. World Epoxy Resin Underfill Adhesive Production Market Share by Region (2027-2032)

Table 10. World Epoxy Resin Underfill Adhesive Average Price by Region (2021-2026) & (US\$/kg)

Table 11. World Epoxy Resin Underfill Adhesive Average Price by Region (2027-2032) & (US\$/kg)

Table 12. Epoxy Resin Underfill Adhesive Major Market Trends

Table 13. World Epoxy Resin Underfill Adhesive Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Epoxy Resin Underfill Adhesive Consumption by Region (2021-2026) & (Tons)

Table 15. World Epoxy Resin Underfill Adhesive Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Epoxy Resin Underfill Adhesive Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Epoxy Resin Underfill Adhesive Producers in 2025

Table 18. World Epoxy Resin Underfill Adhesive Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Epoxy Resin Underfill Adhesive Producers in 2025

Table 20. World Epoxy Resin Underfill Adhesive Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 21. Global Epoxy Resin Underfill Adhesive Company Evaluation Quadrant

Table 22. World Epoxy Resin Underfill Adhesive Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Epoxy Resin Underfill Adhesive Production Site of Key Manufacturer

Table 24. Epoxy Resin Underfill Adhesive Market: Company Product Type Footprint

Table 25. Epoxy Resin Underfill Adhesive Market: Company Product Application Footprint

Table 26. Epoxy Resin Underfill Adhesive Competitive Factors

Table 27. Epoxy Resin Underfill Adhesive New Entrant and Capacity Expansion Plans

Table 28. Epoxy Resin Underfill Adhesive Mergers & Acquisitions Activity

Table 29. United States VS China Epoxy Resin Underfill Adhesive Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Epoxy Resin Underfill Adhesive Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Epoxy Resin Underfill Adhesive Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Epoxy Resin Underfill Adhesive Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Epoxy Resin Underfill Adhesive Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Epoxy Resin Underfill Adhesive Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share (2021-2026)

Table 37. China Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Epoxy Resin Underfill Adhesive Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Epoxy Resin Underfill Adhesive Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Epoxy Resin Underfill Adhesive Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share (2021-2026)

Table 42. Rest of World Based Epoxy Resin Underfill Adhesive Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share (2021-2026)

Table 47. World Epoxy Resin Underfill Adhesive Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Epoxy Resin Underfill Adhesive Production by Type (2021-2026) & (Tons)

Table 49. World Epoxy Resin Underfill Adhesive Production by Type (2027-2032) & (Tons)

Table 50. World Epoxy Resin Underfill Adhesive Production Value by Type (2021-2026) & (USD Million)

Table 51. World Epoxy Resin Underfill Adhesive Production Value by Type (2027-2032) & (USD Million)

Table 52. World Epoxy Resin Underfill Adhesive Average Price by Type (2021-2026) & (US\$/kg)

Table 53. World Epoxy Resin Underfill Adhesive Average Price by Type (2027-2032) & (US\$/kg)

Table 54. World Epoxy Resin Underfill Adhesive Production Value by Form, (USD Million), 2021 & 2025 & 2032

Table 55. World Epoxy Resin Underfill Adhesive Production by Form (2021-2026) & (Tons)

Table 56. World Epoxy Resin Underfill Adhesive Production by Form (2027-2032) & (Tons)

Table 57. World Epoxy Resin Underfill Adhesive Production Value by Form (2021-2026) & (USD Million)

Table 58. World Epoxy Resin Underfill Adhesive Production Value by Form (2027-2032) & (USD Million)

Table 59. World Epoxy Resin Underfill Adhesive Average Price by Form (2021-2026) & (US\$/kg)

Table 60. World Epoxy Resin Underfill Adhesive Average Price by Form (2027-2032) &

(US\$/kg)

Table 61. World Epoxy Resin Underfill Adhesive Production Value by Curing Technology, (USD Million), 2021 & 2025 & 2032

Table 62. World Epoxy Resin Underfill Adhesive Production by Curing Technology (2021-2026) & (Tons)

Table 63. World Epoxy Resin Underfill Adhesive Production by Curing Technology (2027-2032) & (Tons)

Table 64. World Epoxy Resin Underfill Adhesive Production Value by Curing Technology (2021-2026) & (USD Million)

Table 65. World Epoxy Resin Underfill Adhesive Production Value by Curing Technology (2027-2032) & (USD Million)

Table 66. World Epoxy Resin Underfill Adhesive Average Price by Curing Technology (2021-2026) & (US\$/kg)

Table 67. World Epoxy Resin Underfill Adhesive Average Price by Curing Technology (2027-2032) & (US\$/kg)

Table 68. World Epoxy Resin Underfill Adhesive Production Value by Filler Type, (USD Million), 2021 & 2025 & 2032

Table 69. World Epoxy Resin Underfill Adhesive Production by Filler Type (2021-2026) & (Tons)

Table 70. World Epoxy Resin Underfill Adhesive Production by Filler Type (2027-2032) & (Tons)

Table 71. World Epoxy Resin Underfill Adhesive Production Value by Filler Type (2021-2026) & (USD Million)

Table 72. World Epoxy Resin Underfill Adhesive Production Value by Filler Type (2027-2032) & (USD Million)

Table 73. World Epoxy Resin Underfill Adhesive Average Price by Filler Type (2021-2026) & (US\$/kg)

Table 74. World Epoxy Resin Underfill Adhesive Average Price by Filler Type (2027-2032) & (US\$/kg)

Table 75. World Epoxy Resin Underfill Adhesive Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Epoxy Resin Underfill Adhesive Production by Application (2021-2026) & (Tons)

Table 77. World Epoxy Resin Underfill Adhesive Production by Application (2027-2032) & (Tons)

Table 78. World Epoxy Resin Underfill Adhesive Production Value by Application (2021-2026) & (USD Million)

Table 79. World Epoxy Resin Underfill Adhesive Production Value by Application (2027-2032) & (USD Million)

Table 80. World Epoxy Resin Underfill Adhesive Average Price by Application (2021-2026) & (US\$/kg)

Table 81. World Epoxy Resin Underfill Adhesive Average Price by Application (2027-2032) & (US\$/kg)

Table 82. Hubei Huitian New Materials Co., Ltd. (????) Basic Information, Manufacturing Base and Competitors

Table 83. Hubei Huitian New Materials Co., Ltd. (????) Major Business

Table 84. Hubei Huitian New Materials Co., Ltd. (????) Epoxy Resin Underfill Adhesive Product and Services

Table 85. Hubei Huitian New Materials Co., Ltd. (????) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Hubei Huitian New Materials Co., Ltd. (????) Recent Developments/Updates

Table 87. Hubei Huitian New Materials Co., Ltd. (????) Competitive Strengths & Weaknesses

Table 88. Darbond Technology Co., Ltd. (darbond.com) Basic Information, Manufacturing Base and Competitors

Table 89. Darbond Technology Co., Ltd. (darbond.com) Major Business

Table 90. Darbond Technology Co., Ltd. (darbond.com) Epoxy Resin Underfill Adhesive Product and Services

Table 91. Darbond Technology Co., Ltd. (darbond.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Darbond Technology Co., Ltd. (darbond.com) Recent Developments/Updates

Table 93. Darbond Technology Co., Ltd. (darbond.com) Competitive Strengths & Weaknesses

Table 94. Henkel AG & Co. KGaA (henkel.com) Basic Information, Manufacturing Base and Competitors

Table 95. Henkel AG & Co. KGaA (henkel.com) Major Business

Table 96. Henkel AG & Co. KGaA (henkel.com) Epoxy Resin Underfill Adhesive Product and Services

Table 97. Henkel AG & Co. KGaA (henkel.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Henkel AG & Co. KGaA (henkel.com) Recent Developments/Updates

Table 99. Henkel AG & Co. KGaA (henkel.com) Competitive Strengths & Weaknesses

Table 100. Element Solutions Inc (elementsolutionsinc.com) Basic Information, Manufacturing Base and Competitors

Table 101. Element Solutions Inc (elementsolutionsinc.com) Major Business

Table 102. Element Solutions Inc (elementsolutionsinc.com) Epoxy Resin Underfill Adhesive Product and Services

Table 103. Element Solutions Inc (elementsolutionsinc.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Element Solutions Inc (elementsolutionsinc.com) Recent Developments/Updates

Table 105. Element Solutions Inc (elementsolutionsinc.com) Competitive Strengths & Weaknesses

Table 106. NAMICS Corporation (???????????) Basic Information, Manufacturing Base and Competitors

Table 107. NAMICS Corporation (???????????) Major Business

Table 108. NAMICS Corporation (???????????) Epoxy Resin Underfill Adhesive Product and Services

Table 109. NAMICS Corporation (???????????) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. NAMICS Corporation (???????????) Recent Developments/Updates

Table 111. NAMICS Corporation (???????????) Competitive Strengths & Weaknesses

Table 112. Resonac Corporation (resonac.com) Basic Information, Manufacturing Base and Competitors

Table 113. Resonac Corporation (resonac.com) Major Business

Table 114. Resonac Corporation (resonac.com) Epoxy Resin Underfill Adhesive Product and Services

Table 115. Resonac Corporation (resonac.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Resonac Corporation (resonac.com) Recent Developments/Updates

Table 117. Resonac Corporation (resonac.com) Competitive Strengths & Weaknesses

Table 118. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Basic Information, Manufacturing Base and Competitors

Table 119. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Major Business

Table 120. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Epoxy Resin Underfill Adhesive Product and Services

Table 121. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Recent Developments/Updates

Table 123. Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp) Competitive Strengths & Weaknesses

Table 124. Dexerials Corporation (dexerials.jp) Basic Information, Manufacturing Base and Competitors

Table 125. Dexerials Corporation (dexerials.jp) Major Business

Table 126. Dexerials Corporation (dexerials.jp) Epoxy Resin Underfill Adhesive Product and Services

Table 127. Dexerials Corporation (dexerials.jp) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Dexerials Corporation (dexerials.jp) Recent Developments/Updates

Table 129. Dexerials Corporation (dexerials.jp) Competitive Strengths & Weaknesses

Table 130. H.B. Fuller Company (hbfuller.com) Basic Information, Manufacturing Base and Competitors

Table 131. H.B. Fuller Company (hbfuller.com) Major Business

Table 132. H.B. Fuller Company (hbfuller.com) Epoxy Resin Underfill Adhesive Product and Services

Table 133. H.B. Fuller Company (hbfuller.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. H.B. Fuller Company (hbfuller.com) Recent Developments/Updates

Table 135. H.B. Fuller Company (hbfuller.com) Competitive Strengths & Weaknesses

Table 136. ThreeBond Co., Ltd. (threebond.co.jp) Basic Information, Manufacturing Base and Competitors

Table 137. ThreeBond Co., Ltd. (threebond.co.jp) Major Business

Table 138. ThreeBond Co., Ltd. (threebond.co.jp) Epoxy Resin Underfill Adhesive Product and Services

Table 139. ThreeBond Co., Ltd. (threebond.co.jp) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. ThreeBond Co., Ltd. (threebond.co.jp) Recent Developments/Updates

Table 141. ThreeBond Co., Ltd. (threebond.co.jp) Competitive Strengths & Weaknesses

Table 142. Hoenle AG (Hoenle) Basic Information, Manufacturing Base and Competitors

Table 143. Hoenle AG (Hoenle) Major Business

Table 144. Hoenle AG (Hoenle) Epoxy Resin Underfill Adhesive Product and Services

Table 145. Hoenle AG (Hoenle) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Hoenle AG (Hoenle) Recent Developments/Updates

Table 147. Hoenle AG (Hoenle) Competitive Strengths & Weaknesses

Table 148. Zymet, Inc. (zymet.com) Basic Information, Manufacturing Base and Competitors

Table 149. Zymet, Inc. (zymet.com) Major Business

Table 150. Zymet, Inc. (zymet.com) Epoxy Resin Underfill Adhesive Product and Services

Table 151. Zymet, Inc. (zymet.com) Epoxy Resin Underfill Adhesive Production (Tons), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Zymet, Inc. (zymet.com) Recent Developments/Updates

Table 153. Zymet, Inc. (zymet.com) Competitive Strengths & Weaknesses

Table 154. Global Key Players of Epoxy Resin Underfill Adhesive Upstream (Raw Materials)

Table 155. Global Epoxy Resin Underfill Adhesive Typical Customers

Table 156. Epoxy Resin Underfill Adhesive Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Epoxy Resin Underfill Adhesive Picture

Figure 2. World Epoxy Resin Underfill Adhesive Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Epoxy Resin Underfill Adhesive Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Epoxy Resin Underfill Adhesive Production (2021-2032) & (Tons)

Figure 5. World Epoxy Resin Underfill Adhesive Average Price (2021-2032) & (US\$/kg)

Figure 6. World Epoxy Resin Underfill Adhesive Production Value Market Share by Region (2021-2032)

Figure 7. World Epoxy Resin Underfill Adhesive Production Market Share by Region (2021-2032)

Figure 8. North America Epoxy Resin Underfill Adhesive Production (2021-2032) & (Tons)

Figure 9. Europe Epoxy Resin Underfill Adhesive Production (2021-2032) & (Tons)

Figure 10. China Epoxy Resin Underfill Adhesive Production (2021-2032) & (Tons)

Figure 11. Japan Epoxy Resin Underfill Adhesive Production (2021-2032) & (Tons)

Figure 12. Epoxy Resin Underfill Adhesive Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 15. World Epoxy Resin Underfill Adhesive Consumption Market Share by Region (2021-2032)

Figure 16. United States Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 17. China Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 18. Europe Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 19. Japan Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 20. South Korea Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 22. India Epoxy Resin Underfill Adhesive Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Epoxy Resin Underfill Adhesive by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Epoxy Resin Underfill Adhesive Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Epoxy Resin Underfill

## Adhesive Markets in 2025

Figure 26. United States VS China: Epoxy Resin Underfill Adhesive Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Epoxy Resin Underfill Adhesive Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Epoxy Resin Underfill Adhesive Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share 2025

Figure 30. China Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Epoxy Resin Underfill Adhesive Production Market Share 2025

Figure 32. World Epoxy Resin Underfill Adhesive Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Epoxy Resin Underfill Adhesive Production Value Market Share by Type in 2025

Figure 34. Package Level Underfill

Figure 35. Board Level Underfill

Figure 36. Wafer Level Underfill

Figure 37. World Epoxy Resin Underfill Adhesive Production Market Share by Type (2021-2032)

Figure 38. World Epoxy Resin Underfill Adhesive Production Value Market Share by Type (2021-2032)

Figure 39. World Epoxy Resin Underfill Adhesive Average Price by Type (2021-2032) & (US\$/kg)

Figure 40. World Epoxy Resin Underfill Adhesive Production Value by Form, (USD Million), 2021 & 2025 & 2032

Figure 41. World Epoxy Resin Underfill Adhesive Production Value Market Share by Form in 2025

Figure 42. Liquid

Figure 43. Pre-Molded

Figure 44. Dry Film

Figure 45. World Epoxy Resin Underfill Adhesive Production Market Share by Form (2021-2032)

Figure 46. World Epoxy Resin Underfill Adhesive Production Value Market Share by Form (2021-2032)

Figure 47. World Epoxy Resin Underfill Adhesive Average Price by Form (2021-2032) & (US\$/kg)

- Figure 48. World Epoxy Resin Underfill Adhesive Production Value by Curing Technology, (USD Million), 2021 & 2025 & 2032
- Figure 49. World Epoxy Resin Underfill Adhesive Production Value Market Share by Curing Technology in 2025
- Figure 50. Capillary Underfill
- Figure 51. No-Flow Underfill
- Figure 52. Others
- Figure 53. World Epoxy Resin Underfill Adhesive Production Market Share by Curing Technology (2021-2032)
- Figure 54. World Epoxy Resin Underfill Adhesive Production Value Market Share by Curing Technology (2021-2032)
- Figure 55. World Epoxy Resin Underfill Adhesive Average Price by Curing Technology (2021-2032) & (US\$/kg)
- Figure 56. World Epoxy Resin Underfill Adhesive Production Value by Filler Type, (USD Million), 2021 & 2025 & 2032
- Figure 57. World Epoxy Resin Underfill Adhesive Production Value Market Share by Filler Type in 2025
- Figure 58. Silica-Filled
- Figure 59. Nano-Filled
- Figure 60. Others
- Figure 61. World Epoxy Resin Underfill Adhesive Production Market Share by Filler Type (2021-2032)
- Figure 62. World Epoxy Resin Underfill Adhesive Production Value Market Share by Filler Type (2021-2032)
- Figure 63. World Epoxy Resin Underfill Adhesive Average Price by Filler Type (2021-2032) & (US\$/kg)
- Figure 64. World Epoxy Resin Underfill Adhesive Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 65. World Epoxy Resin Underfill Adhesive Production Value Market Share by Application in 2025
- Figure 66. Consumer Electronics
- Figure 67. Automotive Electronics
- Figure 68. Telecommunications And Infrastructure
- Figure 69. Defense And Aerospace Electronics
- Figure 70. Others
- Figure 71. World Epoxy Resin Underfill Adhesive Production Market Share by Application (2021-2032)
- Figure 72. World Epoxy Resin Underfill Adhesive Production Value Market Share by Application (2021-2032)

Figure 73. World Epoxy Resin Underfill Adhesive Average Price by Application (2021-2032) & (US\$/kg)

Figure 74. Epoxy Resin Underfill Adhesive Industry Chain

Figure 75. Epoxy Resin Underfill Adhesive Procurement Model

Figure 76. Epoxy Resin Underfill Adhesive Sales Model

Figure 77. Epoxy Resin Underfill Adhesive Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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