

# Global Epoxy Underfill Encapsulant 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 Underfill Encapsulant 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 underfill encapsulant is a high-reliability insulating encapsulation material used in semiconductor packaging and board-level assembly. It is typically supplied as a one-component heat-curable epoxy system in liquid or paste form, and after cure it forms a cross-linked polymer network. Fillers such as silica are often incorporated to optimize flow behavior, coefficient of thermal expansion, mechanical strength, and long-term reliability. The material fills the narrow gap between the chip and the substrate through capillary flow or no-flow processing, providing stress redistribution and structural reinforcement around solder joints, bumps, and interconnects, thereby improving device reliability under thermal cycling, drop shock, bending, humidity, and long-term service conditions. Major categories include capillary underfill encapsulants, no-flow underfill encapsulants, and specialized underfill encapsulants for flex and flip-chip related applications. Typical applications include 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 underfill encapsulant production reached approximately 370 to 460 tons. Based on publicly visible advanced packaging capacity expansion, rising demand from artificial intelligence and high-performance computing related packages, and observable commercial product positioning for high-purity, high-reliability packaging-grade underfill encapsulants, the representative free-on-board price generally ranged

from about US\$1,200 to US\$2,100 per kilogram in 2025.

The global epoxy underfill encapsulant market is evolving rapidly from a conventional packaging support 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 advanced packaging demand has remained strong under AI-driven growth. This means underfill encapsulants 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 encapsulants 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 foundries, outsourced assembly and test providers, and materials companies continue to invest around advanced packaging and high-performance computing platforms, 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 Underfill Encapsulant 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 Underfill Encapsulant market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/kg), 2021-2032

Global Epoxy Underfill Encapsulant 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 Underfill Encapsulant 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 Underfill Encapsulant 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 Underfill Encapsulant

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 Underfill Encapsulant 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 Underfill Encapsulant 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 Underfill Encapsulant product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Epoxy Underfill Encapsulant 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 Underfill Encapsulant 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 Underfill Encapsulant.

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

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