

Global HBM Epoxy Molding Compound (EMC) 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 HBM Epoxy Molding Compound (EMC) market size was valued at US\$ 577 million in 2025 and is forecast to a readjusted size of US\$ 1134 million by 2032 with a CAGR of 9.4% during review period.

HBM Epoxy Molding Compound (EMC) is a specialized semiconductor packaging material used in High Bandwidth Memory (HBM) and other advanced stacked memory modules. It is composed of epoxy resin mixed with inorganic fillers, designed to provide mechanical strength, thermal stability, and low warpage during the molding process. Low-stress and high-thermal-conductivity variants ensure reliable protection for densely stacked chips, maintaining the alignment of TSVs and solder balls while minimizing thermal and mechanical stresses. HBM EMC is essential for achieving high yield, performance, and reliability in high-density memory packaging applications. In 2025, global HBM Epoxy Molding Compound (EMC) production reached approximately 8 k tons, with an average global market price of around 70000 USD/ton. The production capacity for HBM Epoxy Molding Compound (EMC) in 2025 was approximately 10 k tons. The typical gross profit margin for HBM Epoxy Molding Compound (EMC) between 20% and 40%.

The HBM Epoxy Molding Compound (EMC) market is a niche but fast-growing segment within advanced semiconductor packaging materials, driven by the rapid expansion of AI servers, GPUs, HPC processors, and high-bandwidth memory modules. Compared with conventional memory packaging, HBM requires EMC materials with lower warpage, higher thermal stability, better moisture resistance, finer filler control, and compatibility with 2.5D/3D packaging, TSV structures, and CoWoS-like advanced

packaging processes. As HBM capacity and stack height continue to increase, demand for high-performance EMC is expected to grow alongside advanced packaging capacity expansion from major memory and foundry players.

This report is a detailed and comprehensive analysis for global HBM Epoxy Molding Compound (EMC) 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 HBM Epoxy Molding Compound (EMC) market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global HBM Epoxy Molding Compound (EMC) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global HBM Epoxy Molding Compound (EMC) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global HBM Epoxy Molding Compound (EMC) market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 HBM Epoxy Molding Compound (EMC)

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 HBM Epoxy Molding Compound (EMC) 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 Sumitomo Bakelite, Resonac, Panasonic, Kyocera, Shin-Etsu Chemical, Jiangsu Hhck Advanced Materials, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

HBM Epoxy Molding Compound (EMC) 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

Granular

Flakes

Powder

Market segment by Material

Low Warpage EMC

High Thermal Conductivity EMC

High Toughness EMC

Market segment by Application

HBM2 / HBM2E

HBM3

Others

Major players covered

Sumitomo Bakelite

Resonac

Panasonic

Kyocera

Shin-Etsu Chemical

Jiangsu Hhck Advanced Materials

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 HBM Epoxy Molding Compound (EMC) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of HBM Epoxy Molding Compound (EMC), with price, sales quantity, revenue, and global market share of HBM Epoxy Molding Compound (EMC) from 2021 to 2026.

Chapter 3, the HBM Epoxy Molding Compound (EMC) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the HBM Epoxy Molding Compound (EMC) 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 HBM Epoxy Molding Compound (EMC) 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 HBM Epoxy Molding Compound (EMC).

Chapter 14 and 15, to describe HBM Epoxy Molding Compound (EMC) sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global HBM Epoxy Molding Compound (EMC) Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Granular

1.3.3 Flakes

1.3.4 Powder

1.4 Market Analysis by Material

1.4.1 Overview: Global HBM Epoxy Molding Compound (EMC) Consumption Value by Material: 2021 Versus 2025 Versus 2032

1.4.2 Low Warpage EMC

1.4.3 High Thermal Conductivity EMC

1.4.4 High Toughness EMC

1.5 Market Analysis by Application

1.5.1 Overview: Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.5.2 HBM2 / HBM2E

1.5.3 HBM3

1.5.4 Others

1.6 Global HBM Epoxy Molding Compound (EMC) Market Size & Forecast

1.6.1 Global HBM Epoxy Molding Compound (EMC) Consumption Value (2021 & 2025 & 2032)

1.6.2 Global HBM Epoxy Molding Compound (EMC) Sales Quantity (2021-2032)

1.6.3 Global HBM Epoxy Molding Compound (EMC) Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Sumitomo Bakelite

2.1.1 Sumitomo Bakelite Details

2.1.2 Sumitomo Bakelite Major Business

2.1.3 Sumitomo Bakelite HBM Epoxy Molding Compound (EMC) Product and Services

2.1.4 Sumitomo Bakelite HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Sumitomo Bakelite Recent Developments/Updates

2.2 Resonac

2.2.1 Resonac Details

2.2.2 Resonac Major Business

2.2.3 Resonac HBM Epoxy Molding Compound (EMC) Product and Services

2.2.4 Resonac HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Resonac Recent Developments/Updates

2.3 Panasonic

2.3.1 Panasonic Details

2.3.2 Panasonic Major Business

2.3.3 Panasonic HBM Epoxy Molding Compound (EMC) Product and Services

2.3.4 Panasonic HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Panasonic Recent Developments/Updates

2.4 Kyocera

2.4.1 Kyocera Details

2.4.2 Kyocera Major Business

2.4.3 Kyocera HBM Epoxy Molding Compound (EMC) Product and Services

2.4.4 Kyocera HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Kyocera Recent Developments/Updates

2.5 Shin-Etsu Chemical

2.5.1 Shin-Etsu Chemical Details

2.5.2 Shin-Etsu Chemical Major Business

2.5.3 Shin-Etsu Chemical HBM Epoxy Molding Compound (EMC) Product and Services

2.5.4 Shin-Etsu Chemical HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Shin-Etsu Chemical Recent Developments/Updates

2.6 Jiangsu Hhck Advanced Materials

2.6.1 Jiangsu Hhck Advanced Materials Details

2.6.2 Jiangsu Hhck Advanced Materials Major Business

2.6.3 Jiangsu Hhck Advanced Materials HBM Epoxy Molding Compound (EMC) Product and Services

2.6.4 Jiangsu Hhck Advanced Materials HBM Epoxy Molding Compound (EMC) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Jiangsu Hhck Advanced Materials Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: HBM EPOXY MOLDING COMPOUND (EMC) BY

MANUFACTURER

3.1 Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Manufacturer (2021-2026)

3.2 Global HBM Epoxy Molding Compound (EMC) Revenue by Manufacturer (2021-2026)

3.3 Global HBM Epoxy Molding Compound (EMC) Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of HBM Epoxy Molding Compound (EMC) by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 HBM Epoxy Molding Compound (EMC) Manufacturer Market Share in 2025

3.4.3 Top 6 HBM Epoxy Molding Compound (EMC) Manufacturer Market Share in 2025

3.5 HBM Epoxy Molding Compound (EMC) Market: Overall Company Footprint Analysis

3.5.1 HBM Epoxy Molding Compound (EMC) Market: Region Footprint

3.5.2 HBM Epoxy Molding Compound (EMC) Market: Company Product Type Footprint

3.5.3 HBM Epoxy Molding Compound (EMC) Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global HBM Epoxy Molding Compound (EMC) Market Size by Region

4.1.1 Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Region (2021-2032)

4.1.2 Global HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2021-2032)

4.1.3 Global HBM Epoxy Molding Compound (EMC) Average Price by Region (2021-2032)

4.2 North America HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032)

4.3 Europe HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032)

4.4 Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032)

4.5 South America HBM Epoxy Molding Compound (EMC) Consumption Value

(2021-2032)

4.6 Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2032)

5.2 Global HBM Epoxy Molding Compound (EMC) Consumption Value by Type (2021-2032)

5.3 Global HBM Epoxy Molding Compound (EMC) Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2032)

6.2 Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application (2021-2032)

6.3 Global HBM Epoxy Molding Compound (EMC) Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2032)

7.2 North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2032)

7.3 North America HBM Epoxy Molding Compound (EMC) Market Size by Country

7.3.1 North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2032)

7.3.2 North America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2032)

8.2 Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Application

(2021-2032)

8.3 Europe HBM Epoxy Molding Compound (EMC) Market Size by Country

8.3.1 Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Country

(2021-2032)

8.3.2 Europe HBM Epoxy Molding Compound (EMC) Consumption Value by Country

(2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Type

(2021-2032)

9.2 Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Application

(2021-2032)

9.3 Asia-Pacific HBM Epoxy Molding Compound (EMC) Market Size by Region

9.3.1 Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Region

(2021-2032)

9.3.2 Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type

(2021-2032)

10.2 South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2032)

10.3 South America HBM Epoxy Molding Compound (EMC) Market Size by Country

10.3.1 South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2032)

10.3.2 South America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa HBM Epoxy Molding Compound (EMC) Market Size by Country

11.3.1 Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 HBM Epoxy Molding Compound (EMC) Market Drivers

12.2 HBM Epoxy Molding Compound (EMC) Market Restraints

12.3 HBM Epoxy Molding Compound (EMC) Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of HBM Epoxy Molding Compound (EMC) and Key Manufacturers

13.2 Manufacturing Costs Percentage of HBM Epoxy Molding Compound (EMC)

13.3 HBM Epoxy Molding Compound (EMC) Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 HBM Epoxy Molding Compound (EMC) Typical Distributors

14.3 HBM Epoxy Molding Compound (EMC) Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Material, (USD Million), 2021 & 2025 & 2032

Table 3. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 4. Sumitomo Bakelite Basic Information, Manufacturing Base and Competitors

Table 5. Sumitomo Bakelite Major Business

Table 6. Sumitomo Bakelite HBM Epoxy Molding Compound (EMC) Product and Services

Table 7. Sumitomo Bakelite HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 8. Sumitomo Bakelite Recent Developments/Updates

Table 9. Resonac Basic Information, Manufacturing Base and Competitors

Table 10. Resonac Major Business

Table 11. Resonac HBM Epoxy Molding Compound (EMC) Product and Services

Table 12. Resonac HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 13. Resonac Recent Developments/Updates

Table 14. Panasonic Basic Information, Manufacturing Base and Competitors

Table 15. Panasonic Major Business

Table 16. Panasonic HBM Epoxy Molding Compound (EMC) Product and Services

Table 17. Panasonic HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 18. Panasonic Recent Developments/Updates

Table 19. Kyocera Basic Information, Manufacturing Base and Competitors

Table 20. Kyocera Major Business

Table 21. Kyocera HBM Epoxy Molding Compound (EMC) Product and Services

Table 22. Kyocera HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 23. Kyocera Recent Developments/Updates

- Table 24. Shin?Etsu Chemical Basic Information, Manufacturing Base and Competitors
- Table 25. Shin?Etsu Chemical Major Business
- Table 26. Shin?Etsu Chemical HBM Epoxy Molding Compound (EMC) Product and Services
- Table 27. Shin?Etsu Chemical HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 28. Shin?Etsu Chemical Recent Developments/Updates
- Table 29. Jiangsu Hhck Advanced Materials Basic Information, Manufacturing Base and Competitors
- Table 30. Jiangsu Hhck Advanced Materials Major Business
- Table 31. Jiangsu Hhck Advanced Materials HBM Epoxy Molding Compound (EMC) Product and Services
- Table 32. Jiangsu Hhck Advanced Materials HBM Epoxy Molding Compound (EMC) Sales Quantity (Tons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 33. Jiangsu Hhck Advanced Materials Recent Developments/Updates
- Table 34. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Manufacturer (2021-2026) & (Tons)
- Table 35. Global HBM Epoxy Molding Compound (EMC) Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 36. Global HBM Epoxy Molding Compound (EMC) Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 37. Market Position of Manufacturers in HBM Epoxy Molding Compound (EMC), (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 38. Head Office and HBM Epoxy Molding Compound (EMC) Production Site of Key Manufacturer
- Table 39. HBM Epoxy Molding Compound (EMC) Market: Company Product Type Footprint
- Table 40. HBM Epoxy Molding Compound (EMC) Market: Company Product Application Footprint
- Table 41. HBM Epoxy Molding Compound (EMC) New Market Entrants and Barriers to Market Entry
- Table 42. HBM Epoxy Molding Compound (EMC) Mergers, Acquisition, Agreements, and Collaborations
- Table 43. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 44. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Region (2021-2026) & (Tons)

Table 45. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Region (2027-2032) & (Tons)

Table 46. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2021-2026) & (USD Million)

Table 47. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2027-2032) & (USD Million)

Table 48. Global HBM Epoxy Molding Compound (EMC) Average Price by Region (2021-2026) & (US\$/Ton)

Table 49. Global HBM Epoxy Molding Compound (EMC) Average Price by Region (2027-2032) & (US\$/Ton)

Table 50. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 51. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 52. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Type (2021-2026) & (USD Million)

Table 53. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Type (2027-2032) & (USD Million)

Table 54. Global HBM Epoxy Molding Compound (EMC) Average Price by Type (2021-2026) & (US\$/Ton)

Table 55. Global HBM Epoxy Molding Compound (EMC) Average Price by Type (2027-2032) & (US\$/Ton)

Table 56. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2026) & (Tons)

Table 57. Global HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 58. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application (2021-2026) & (USD Million)

Table 59. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application (2027-2032) & (USD Million)

Table 60. Global HBM Epoxy Molding Compound (EMC) Average Price by Application (2021-2026) & (US\$/Ton)

Table 61. Global HBM Epoxy Molding Compound (EMC) Average Price by Application (2027-2032) & (US\$/Ton)

Table 62. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 63. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 64. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by

Application (2021-2026) & (Tons)

Table 65. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 66. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2026) & (Tons)

Table 67. North America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2027-2032) & (Tons)

Table 68. North America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2026) & (USD Million)

Table 69. North America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2027-2032) & (USD Million)

Table 70. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 71. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 72. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2026) & (Tons)

Table 73. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 74. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2026) & (Tons)

Table 75. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2027-2032) & (Tons)

Table 76. Europe HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2026) & (USD Million)

Table 77. Europe HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2027-2032) & (USD Million)

Table 78. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 79. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 80. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2026) & (Tons)

Table 81. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 82. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Region (2021-2026) & (Tons)

Table 83. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity by Region (2027-2032) & (Tons)

Table 84. Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2021-2026) & (USD Million)

Table 85. Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value by Region (2027-2032) & (USD Million)

Table 86. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 87. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 88. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2026) & (Tons)

Table 89. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 90. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2026) & (Tons)

Table 91. South America HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2027-2032) & (Tons)

Table 92. South America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2026) & (USD Million)

Table 93. South America HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2027-2032) & (USD Million)

Table 94. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2021-2026) & (Tons)

Table 95. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Type (2027-2032) & (Tons)

Table 96. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2021-2026) & (Tons)

Table 97. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Application (2027-2032) & (Tons)

Table 98. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2021-2026) & (Tons)

Table 99. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity by Country (2027-2032) & (Tons)

Table 100. Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2021-2026) & (USD Million)

Table 101. Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value by Country (2027-2032) & (USD Million)

Table 102. HBM Epoxy Molding Compound (EMC) Raw Material

Table 103. Key Manufacturers of HBM Epoxy Molding Compound (EMC) Raw Materials

Table 104. HBM Epoxy Molding Compound (EMC) Typical Distributors

Table 105. HBM Epoxy Molding Compound (EMC) Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. HBM Epoxy Molding Compound (EMC) Picture
- Figure 2. Global HBM Epoxy Molding Compound (EMC) Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global HBM Epoxy Molding Compound (EMC) Revenue Market Share by Type in 2025
- Figure 4. Granular Examples
- Figure 5. Flakes Examples
- Figure 6. Powder Examples
- Figure 7. Global HBM Epoxy Molding Compound (EMC) Revenue by Material, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global HBM Epoxy Molding Compound (EMC) Revenue Market Share by Material in 2025
- Figure 9. Low Warpage EMC Examples
- Figure 10. High Thermal Conductivity EMC Examples
- Figure 11. High Toughness EMC Examples
- Figure 12. Global HBM Epoxy Molding Compound (EMC) Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 13. Global HBM Epoxy Molding Compound (EMC) Revenue Market Share by Application in 2025
- Figure 14. HBM2 / HBM2E Examples
- Figure 15. HBM3 Examples
- Figure 16. Others Examples
- Figure 17. Global HBM Epoxy Molding Compound (EMC) Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 18. Global HBM Epoxy Molding Compound (EMC) Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 19. Global HBM Epoxy Molding Compound (EMC) Sales Quantity (2021-2032) & (Tons)
- Figure 20. Global HBM Epoxy Molding Compound (EMC) Price (2021-2032) & (US\$/Ton)
- Figure 21. Global HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Manufacturer in 2025
- Figure 22. Global HBM Epoxy Molding Compound (EMC) Revenue Market Share by Manufacturer in 2025
- Figure 23. Producer Shipments of HBM Epoxy Molding Compound (EMC) by

Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 24. Top 3 HBM Epoxy Molding Compound (EMC) Manufacturer (Revenue) Market Share in 2025

Figure 25. Top 6 HBM Epoxy Molding Compound (EMC) Manufacturer (Revenue) Market Share in 2025

Figure 26. Global HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Region (2021-2032)

Figure 27. Global HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Region (2021-2032)

Figure 28. North America HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 29. Europe HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 30. Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 31. South America HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 32. Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 33. Global HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 34. Global HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Type (2021-2032)

Figure 35. Global HBM Epoxy Molding Compound (EMC) Average Price by Type (2021-2032) & (US\$/Ton)

Figure 36. Global HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 37. Global HBM Epoxy Molding Compound (EMC) Revenue Market Share by Application (2021-2032)

Figure 38. Global HBM Epoxy Molding Compound (EMC) Average Price by Application (2021-2032) & (US\$/Ton)

Figure 39. North America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 40. North America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 41. North America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Country (2021-2032)

Figure 42. North America HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Country (2021-2032)

Figure 43. United States HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 44. Canada HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 45. Mexico HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 46. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 47. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 48. Europe HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Country (2021-2032)

Figure 49. Europe HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Country (2021-2032)

Figure 50. Germany HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 51. France HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 52. United Kingdom HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 53. Russia HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 54. Italy HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 55. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 56. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 57. Asia-Pacific HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Region (2021-2032)

Figure 58. Asia-Pacific HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Region (2021-2032)

Figure 59. China HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 60. Japan HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 61. South Korea HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 62. India HBM Epoxy Molding Compound (EMC) Consumption Value

(2021-2032) & (USD Million)

Figure 63. Southeast Asia HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 64. Australia HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 65. South America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 66. South America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 67. South America HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Country (2021-2032)

Figure 68. South America HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Country (2021-2032)

Figure 69. Brazil HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 70. Argentina HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 71. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Type (2021-2032)

Figure 72. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Application (2021-2032)

Figure 73. Middle East & Africa HBM Epoxy Molding Compound (EMC) Sales Quantity Market Share by Country (2021-2032)

Figure 74. Middle East & Africa HBM Epoxy Molding Compound (EMC) Consumption Value Market Share by Country (2021-2032)

Figure 75. Turkey HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 76. Egypt HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 77. Saudi Arabia HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 78. South Africa HBM Epoxy Molding Compound (EMC) Consumption Value (2021-2032) & (USD Million)

Figure 79. HBM Epoxy Molding Compound (EMC) Market Drivers

Figure 80. HBM Epoxy Molding Compound (EMC) Market Restraints

Figure 81. HBM Epoxy Molding Compound (EMC) Market Trends

Figure 82. Porters Five Forces Analysis

Figure 83. Manufacturing Cost Structure Analysis of HBM Epoxy Molding Compound (EMC) in 2025

Figure 84. Manufacturing Process Analysis of HBM Epoxy Molding Compound (EMC)

Figure 85. HBM Epoxy Molding Compound (EMC) Industrial Chain

Figure 86. Sales Channel: Direct to End-User vs Distributors

Figure 87. Direct Channel Pros & Cons

Figure 88. Indirect Channel Pros & Cons

Figure 89. Methodology

Figure 90. Research Process and Data Source

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