

Global HBM Underfill 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 Underfill market size was valued at US\$ 48.78 million in 2025 and is forecast to a readjusted size of US\$ 123 million by 2032 with a CAGR of 11.3% during review period.

HBM underfill material is a semiconductor packaging material used within stacked high-bandwidth memory devices and at the interfaces between the HBM stack, base die, and interposer. It fills the microscopic gaps surrounding micro-bumps, through-silicon vias, and inter-die connections, forming an electrically insulating and mechanically protective structure after curing. The material helps distribute thermomechanical stress caused by differences in coefficients of thermal expansion, thereby reducing solder-joint fatigue, interfacial delamination, die cracking, and package warpage while improving thermal, moisture, and long-term reliability. Depending on the packaging process, HBM underfill materials mainly include molded underfill or mass reflow molded underfill (MUF/MR-MUF), capillary underfill (CUF), non-conductive paste (NCP), and non-conductive film (NCF), with liquid MR-MUF and film-type NCF representing two important HBM stacking approaches.

The global HBM underfill material market is being driven by expanding demand for generative AI, AI servers, high-performance computing, and data-center accelerators. As HBM3E, HBM4, and subsequent generations move toward 12-high, 16-high, and even higher-stack architectures, thinner dies, finer micro-bump pitches, and narrower inter-die gaps are creating more stringent requirements for low-viscosity flow, fine-gap filling, low warpage, low coefficient of thermal expansion, high thermal conductivity, and rapid curing. SK hynix has applied advanced MR-MUF technology to volume-produced 12-layer HBM3E and continues to use the process for HBM4 and HBM4E products, while demand for NCF is also expected to increase as the number of stacked HBM dies

risers. Consequently, suppliers with advanced formulation capabilities, ultra-fine-gap processing performance, proven long-term reliability, and qualification experience with leading memory manufacturers are expected to gain a stronger competitive position. Nevertheless, lengthy customer qualification cycles and high technological barriers are likely to keep the market concentrated among a limited number of semiconductor-grade material suppliers. In 2025, global HBM Underfill production reached approximately 30.2 tons, with an average global market price of around 1570 USD/kg. The production capacity for HBM Underfill in 2025 was approximately 35 tons. The typical gross profit margin for HBM Underfill between 20% and 40%.

Report Scope

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

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

Global HBM Underfill 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 HBM Underfill 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 HBM Underfill

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 Underfill 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 NAMICS Corporation, Henkel, Resonac Corporation, Sumitomo Bakelite, Hubei Huitian New Materials, etc.

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

Market Segmentation

HBM Underfill 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

Molded Underfill?MUF?

Capillary Underfill?CUF?

Market segment by HBM Stacking Layers

For 8-High and Below HBM

For 12-High HBM

For 16-High and Above HBM

Market segment by Application

AI Servers and Data Centers

Networking and Telecommunications

Automotive Electronics

Aerospace and Defense

Others

Major players covered

NAMICS Corporation

Henkel

Resonac Corporation

Sumitomo Bakelite

Hubei Huitian New 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)

Chapter Outline

Chapter 1, to describe HBM Underfill product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the HBM Underfill 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 Underfill 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 Underfill.

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

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