

Global HBM Underfill Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HBM Underfill market size is expected to reach \$ 123 million by 2032, rising at a market growth of 11.3% CAGR during the forecast period (2026-2032).

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 rises. 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 studies the global HBM Underfill production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global HBM Underfill total production and demand, 2021-2032, (Tons)

Global HBM Underfill total production value, 2021-2032, (USD Million)

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

Global HBM Underfill consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: HBM Underfill domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global HBM Underfill 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HBM Underfill 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 HBM Underfill Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HBM Underfill Market, Segmentation by Type:

Molded Underfill?MUF?

Capillary Underfill?CUF?

Global HBM Underfill Market, Segmentation by HBM Stacking Layers:

For 8-High and Below HBM

For 12-High HBM

For 16-High and Above HBM

Global HBM Underfill Market, Segmentation by Application:

AI Servers and Data Centers

Networking and Telecommunications

Automotive Electronics

Aerospace and Defense

Others

Companies Profiled:

NAMICS Corporation

Henkel

Resonac Corporation

Sumitomo Bakelite

Hubei Huitian New Materials

Key Questions Answered:

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

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