

Global Liquid Die Attach Adhesive 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 Liquid Die Attach Adhesive market size was valued at US\$ 747 million in 2025 and is forecast to a readjusted size of US\$ 965 million by 2032 with a CAGR of 3.7% during review period.

Liquid die attach adhesive is a fluid functional bonding material used in semiconductor back end packaging to attach bare dies to lead frames, organic substrates, ceramic substrates, metal substrates, or thermal carriers. Its core purpose is to provide mechanical fixation, heat transfer, electrical connection or electrical insulation, stress buffering, and long term reliability within a controlled bond line thickness. These products typically use epoxy, silicone, or composite resin systems as the base matrix, with fillers such as silver powder, copper powder, alumina, aluminum nitride, and silica to tune electrical conductivity, thermal conductivity, coefficient of thermal expansion, thixotropy, and resin bleed. Stable interfacial bonding is formed through thermal curing, low temperature fast curing, room temperature curing, pressure sintering, or pressureless sintering. Common delivery forms include one component or two component pastes, syringe packages, bulk containers, and frozen premixed materials, compatible with automated dispensing, pin transfer, screen printing, and stencil printing processes. Key customers include outsourced semiconductor assembly and test providers, power module manufacturers, LED and optoelectronic device makers, MEMS and sensor packaging companies, smart card module producers, and high reliability electronics manufacturers. The value of these materials lies in improving die attach yield, reducing voids and contamination, enhancing heat dissipation paths, supporting thinner and smaller package structures, and meeting the reliability and high volume manufacturing requirements of automotive electronics, power semiconductors, communications, data centers, and consumer electronics.

The value of liquid die attach adhesive is evolving from a conventional bonding material into a critical interface material for semiconductor packaging reliability. As dies become thinner, package pitches become finer, power density increases, and multi die integration expands, the adhesive layer between the die and the carrier must not only provide attachment, but also support heat dissipation, electrical connection or insulation, stress relief, warpage control, and contamination suppression. Traditional low end epoxy adhesives can still serve smart cards, selected LED packages, and general discrete devices, but advanced applications increasingly require a more stable rheology window, lower resin bleed, fewer ionic impurities, lower voiding, and stronger high temperature and high humidity reliability. As a result, competition is moving away from price and single bond strength toward formulation design, customer process compatibility, long term validation data, and mass production consistency. The liquid format offers flexibility through dispensing, pin transfer, printing, and automated equipment, enabling adaptation to different die sizes, substrate materials, and package structures, while balancing multi product validation and high volume manufacturing efficiency.

From a technology perspective, the advancement of liquid die attach adhesive is mainly reflected in higher thermal conductivity, lower stress, lower temperature processing, and sintering based systems. Silver filled conductive epoxy has already established a mature industrial base and continues to offer process compatibility and cost advantages in ICs, optoelectronic devices, hybrid microelectronics, and selected power devices. For SiC, GaN, and high power modules, silver sintering, hybrid silver sintering, and high thermal conductive pastes are gaining more attention because they can replace certain traditional solder materials under higher junction temperature, stronger power cycling, and stricter environmental requirements. Non conductive thermally conductive adhesives and silicone systems target stress sensitive chips, image sensors, MEMS, and selected automotive electronics applications by improving package stability through low modulus, low warpage, and electrical insulation. Future development will further focus on low temperature fast curing, pressureless sintering, low volatility, low halogen content, and compatibility with highly automated dispensing. For customers, the value of material suppliers is not merely adhesive supply, but an integrated process solution covering material selection, cure profile, bond line thickness, void control, and reliability validation.

From an industry structure perspective, the supply chain for liquid die attach adhesive shows clear regional concentration. Japanese, American, and German companies have accumulated strong capabilities in advanced semiconductor materials, resin systems,

silver sintering, silicone die attach, and reliability validation. Korean suppliers have a stable customer base in conductive and non conductive adhesives for semiconductor packaging, while companies in mainland China and Taiwan continue to expand in LED, smart card, MEMS, thermally conductive adhesives, and selected IC die attach materials. Demand is closely tied to semiconductor assembly and test, power modules, LEDs, sensors, and advanced electronics manufacturing, with Asia remaining the most important consumption region. Growth is driven by vehicle electrification, AI servers, high performance computing, power management, industrial automation, optoelectronic sensing, and communications equipment upgrades. Power semiconductors offer the strongest upside for high thermal, high reliability, and silver sintering materials. Although the market may be affected in the short term by semiconductor cycles and customer qualification timelines, advanced packaging, wide bandgap devices, and electronic system miniaturization will continue to raise the unit value and technical barriers of die attach materials, supporting steady long term growth.

This report is a detailed and comprehensive analysis for global Liquid Die Attach Adhesive market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Resin Matrix 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 Liquid Die Attach Adhesive market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Liquid Die Attach Adhesive market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Liquid Die Attach Adhesive market size and forecasts, by Resin Matrix and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Kg), 2021-2032

Global Liquid Die Attach Adhesive 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 Liquid Die Attach Adhesive

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 Liquid Die Attach Adhesive 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 Henkel AG & Co. KGaA, NAMICS Corporation, DELO Industrial Adhesives, Epoxy Technology, Inc., Element Solutions Inc, Heraeus Holding GmbH, AI Technology, Inc., Master Bond Inc., Indium Corporation, Sumitomo Bakelite Co., Ltd., etc.

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

Market Segmentation

Liquid Die Attach Adhesive market is split by Resin Matrix and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Resin Matrix, 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 Resin Matrix

Epoxy-Based Liquid Die Attach Adhesive

Silicone-Based Liquid Die Attach Adhesive

Acrylic-Based Liquid Die Attach Adhesive

Composite Resin-Based Liquid Die Attach Adhesive

Market segment by Thermally Conductive Filler

Silver-Filled Liquid Die Attach Adhesive

Copper-Filled Liquid Die Attach Adhesive

Alumina-Filled Liquid Die Attach Adhesive

Silica-Filled Liquid Die Attach Adhesive

Other

Market segment by Curing Condition

Room Temperature Curing Liquid Die Attach Adhesive

Low Temperature Thermal Curing Liquid Die Attach Adhesive

Medium Temperature Thermal Curing Liquid Die Attach Adhesive

High Temperature Thermal Curing Liquid Die Attach Adhesive

Pressure Sintering Liquid Die Attach Adhesive

Pressureless Sintering Liquid Die Attach Adhesive

Market segment by Primary Performance Positioning

High Thermal Conductivity Liquid Die Attach Adhesive

Low Stress Liquid Die Attach Adhesive

Low Resin Bleed Liquid Die Attach Adhesive

Low Volatility Liquid Die Attach Adhesive

Low Ionic Contamination Liquid Die Attach Adhesive

High Die Shear Strength Liquid Die Attach Adhesive

Fast Curing Liquid Die Attach Adhesive

Other

Market segment by Application

IC Packaging

Discrete Device Packaging

Power Module Packaging

Optoelectronic Device Packaging

MEMS Packaging

Smart Card Module Packaging

Other

Major players covered

Henkel AG & Co. KGaA

NAMICS Corporation

DELO Industrial Adhesives

Epoxy Technology, Inc.

Element Solutions Inc

Heraeus Holding GmbH

AI Technology, Inc.

Master Bond Inc.

Indium Corporation

Sumitomo Bakelite Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

Resonac Holdings Corporation

KYOCERA Corporation

Nagase & Co., Ltd.

PROTAVIC KOREA CO., LTD.

Nan Pao Resins Chemical Group

Darbond Technology Co., Ltd.

Qnity Electronics, Inc.

LiPOLY

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 Liquid Die Attach Adhesive product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Liquid Die Attach Adhesive, with price, sales quantity, revenue, and global market share of Liquid Die Attach Adhesive from 2021 to 2026.

Chapter 3, the Liquid Die Attach Adhesive competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Liquid Die Attach Adhesive 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 Resin Matrix and by Application, with sales market share and growth rate by Resin Matrix, 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 Liquid Die Attach Adhesive market forecast, by regions, by Resin Matrix, 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 Liquid Die Attach Adhesive.

Chapter 14 and 15, to describe Liquid Die Attach Adhesive sales channel, distributors, customers, research findings and conclusion.

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