

Global Liquid Die Attach Adhesive Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GAB4B5AF620DEN.html>

Date: July 2026

Pages: 152

Price: US\$ 4,480.00 (Single User License)

ID: GAB4B5AF620DEN

Abstracts

The global Liquid Die Attach Adhesive market size is expected to reach \$ 965 million by 2032, rising at a market growth of 3.7% CAGR during the forecast period (2026-2032).

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 studies the global Liquid Die Attach Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Liquid Die Attach Adhesive 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 Liquid Die Attach Adhesive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Liquid Die Attach Adhesive total production and demand, 2021-2032, (Tons)

Global Liquid Die Attach Adhesive total production value, 2021-2032, (USD Million)

Global Liquid Die Attach Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Liquid Die Attach Adhesive consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Liquid Die Attach Adhesive domestic production, consumption, key domestic manufacturers and share

Global Liquid Die Attach Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Liquid Die Attach Adhesive production by Resin Matrix, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Liquid Die Attach Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Liquid Die Attach Adhesive 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Liquid Die Attach Adhesive 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 Resin Matrix, 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 Liquid Die Attach Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Liquid Die Attach Adhesive Market, Segmentation 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

Global Liquid Die Attach Adhesive Market, Segmentation 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

Global Liquid Die Attach Adhesive Market, Segmentation 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

Global Liquid Die Attach Adhesive Market, Segmentation 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

Global Liquid Die Attach Adhesive Market, Segmentation by Application:

IC Packaging

Discrete Device Packaging

Power Module Packaging

Optoelectronic Device Packaging

MEMS Packaging

Smart Card Module Packaging

Other

Companies Profiled:

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.

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Key Questions Answered:

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

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