

Global Microelectronics Adhesives Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Microelectronics Adhesives market size is expected to reach \$ 7425 million by 2032, rising at a market growth of 7.7% CAGR during the forecast period (2026-2032).

Microelectronics Adhesives are functional adhesive materials used in semiconductor packaging, microelectronic component assembly, sensors, optical modules, RF devices, power devices and high-reliability electronic systems. They are commonly supplied in liquid, paste, film or preformed formats. Their main functions include die attach, underfill, corner reinforcement, glob top encapsulation, lid attach, electrically conductive interconnection, thermal bonding, optical alignment and environmental protection. These materials typically require high purity, low ionic contamination, low outgassing, low stress, moisture resistance, thermal cycling resistance, dimensional stability and compatibility with automated dispensing, jetting, lamination, thermocompression and curing processes.

Major production regions include Japan, the United States, Germany, China, South Korea and Taiwan, China, where semiconductor and electronic materials supply chains are highly developed. Representative manufacturers include Henkel, NAMICS, Resonac, Panasonic Industry, Shin-Etsu Chemical, MacDermid Alpha, DELO, Meridian Adhesives Group and Darbond Technology. Key applications include flip chip packaging, chip-scale packaging, ball grid array packaging, system-in-package, camera modules, image sensors, MEMS, LiDAR, power modules, automotive electronics and medical electronics.

In 2025, global Microelectronics Adhesives production reached approximately 39,000-43,000 tons. The product mix was mainly composed of epoxy-based underfill

adhesives, die attach adhesives, electrically conductive adhesives, thermally conductive adhesives, optical adhesives and encapsulation or reinforcement adhesives. Driven by demand from semiconductor packaging, high-end sensors, automotive electronics and AI-related advanced packaging, the average FOB price was approximately USD 98-108 per kilogram. Standard microelectronic encapsulation and reinforcement adhesives were priced below the industry average, while silver-filled conductive adhesives, low-stress underfills, high-thermal-conductivity die attach adhesives and optical-grade microelectronics adhesives carried a significant premium.

The global Microelectronics Adhesives market is shifting from conventional electronic assembly materials toward high-reliability, high-precision and highly functional packaging materials. AI servers, high-performance computing, advanced packaging, automotive electronics, image sensors, power semiconductors and wearable medical electronics are raising performance requirements for underfills, die attach adhesives, thermally conductive adhesives, electrically conductive adhesives and optical packaging adhesives. Larger package sizes, finer interconnect pitches, higher thermal density and multi-die integration are accelerating the need for materials that offer not only bonding strength but also low stress, low warpage, high thermal conductivity, low ionic contamination, moisture resistance and long-term reliability. As a result, microelectronics adhesives are becoming critical functional materials that influence packaging yield, device lifetime and system-level performance.

Market challenges include long qualification cycles, high customer entry barriers, raw material price volatility, tighter environmental compliance and cyclical demand in downstream electronics markets. High-end semiconductor and automotive electronics customers typically require long-term reliability data, process-window validation and strict supply chain stability, making it difficult for new entrants to scale quickly. At the same time, traditional consumer electronics applications remain cost-sensitive, creating pricing pressure for standardized adhesive products. Companies with advanced packaging customer access, formulation expertise, local technical service and high-purity manufacturing capabilities are expected to gain stronger competitive positions. Asia Pacific remains the leading production and consumption hub, while Japanese, U.S. and German suppliers maintain technical advantages in high-end material systems, and Chinese suppliers continue to improve in domestic substitution, fast response and mid-to-high-end packaging material adoption.

This report studies the global Microelectronics Adhesives production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Microelectronics Adhesives total production and demand, 2021-2032, (Tons)

Global Microelectronics Adhesives total production value, 2021-2032, (USD Million)

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

Global Microelectronics Adhesives consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Microelectronics Adhesives domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Microelectronics Adhesives 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, Resonac Corporation, Panasonic Industry Co., Ltd., Shin-Etsu Chemical Co., Ltd., Nagase ChemteX Corporation, ThreeBond Co., Ltd., Sunstar Engineering Inc., Fuji Chemical Industrial Co., Ltd., DELO Industrial Adhesives, 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 Microelectronics Adhesives market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 Microelectronics Adhesives Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Microelectronics Adhesives Market, Segmentation by Type:

Underfill and Reinforcement Adhesives

Die Attach Adhesives

Encapsulation and Potting Adhesives

Conductive and Thermal Adhesives

Others

Global Microelectronics Adhesives Market, Segmentation by Material Chemistry:

Epoxy Adhesives

Silicone Adhesives

Acrylic and Urethane Adhesives

Polyimide and Hybrid Adhesives

Global Microelectronics Adhesives Market, Segmentation by Product Form:

Liquid Adhesives

Paste Adhesives

Film Adhesives

Others

Global Microelectronics Adhesives Market, Segmentation by Packaging Platform:

Flip Chip Packaging

Wire Bond Packaging

Advanced Packaging

Board Level Packaging

Global Microelectronics Adhesives Market, Segmentation by Application:

Semiconductor Packaging

Sensors and Optical Modules

Printed Circuit Board and Module Assembly

Power Electronics and Automotive Electronics

Companies Profiled:

Henkel AG & Co. KGaA

NAMICS Corporation

Resonac Corporation

Panasonic Industry Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

Nagase ChemteX Corporation

ThreeBond Co., Ltd.

Sunstar Engineering Inc.

Fuji Chemical Industrial Co., Ltd.

DELO Industrial Adhesives

Hoenle Adhesives GmbH

Protavic International

Element Solutions Inc.?MacDermid Alpha Electronics Solutions?

Parker Hannifin Corporation?Parker LORD?

Meridian Adhesives Group?EPO-TEK?

Master Bond Inc.

Zymet, Inc.

AI Technology, Inc.

AIM Solder

Won Chemical Co., Ltd.

Key Questions Answered:

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

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