

Global Molded Underfill Materials 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 Molded Underfill Materials market size was valued at US\$ 9317 million in 2025 and is forecast to a readjusted size of US\$ 12904 million by 2032 with a CAGR of 4.6% during review period.

Molded underfill materials are a class of advanced semiconductor packaging materials used for flip-chip packages, system-in-package modules, 2.5D packages, wafer-level packages, panel-level packages, and high-bandwidth memory stacks. Their core function is to simultaneously fill the fine gap beneath the chip, protect bumps and solder joints, encapsulate the chip perimeter, and reinforce the package structure during the molding process, thereby addressing the long cycle time of conventional capillary underfill, the difficulty of filling narrow gaps, the complexity of void control, severe warpage in thin packages, and concentrated thermomechanical stress in high-power chips. These materials are typically based on epoxy resin systems and formulated with high-purity silica or functional fillers, curing agents, stress modifiers, coupling agents, release agents, and flow-control components. They are introduced into package structures through transfer molding, compression molding, liquid compression molding, sheet lamination, or wafer-level liquid encapsulation processes. Their key performance characteristics include low coefficient of thermal expansion, high flowability, low warpage, low voiding, high glass transition temperature, high thermal conductivity, low ionic impurities, and strong interfacial adhesion.

The industrial value of molded underfill materials is shifting from that of a single packaging consumable to a critical variable affecting advanced packaging yield and process efficiency. Flip-chip packages, system-in-package modules, 2.5D packages,

and high-density memory stacks continue to reduce the gaps between chips and substrates and between stacked chips. Conventional capillary underfill faces increasing challenges in flow time, void control, thin-package warpage, and consistency across multi-chip structures. MUF simultaneously completes underfill and external encapsulation during the molding step, allowing packaging houses to reduce separate dispensing, flow waiting time, secondary curing, and downstream cleaning. This improves equipment productivity and batch consistency. As package structures expand from mobile device chips to AI processors, HBM, RF modules, and automotive-grade chips, materials must not only protect solder joints and distribute thermomechanical stress, but also balance low CTE, high Tg, high filler dispersion, low ionic impurity levels, low stress, and low warpage. Future competition will not be limited to individual material grades, but will depend on the combined capability of formulation design, molding process windows, customer package design support, and reliability validation.

The supply structure shows clear technology concentration and regional concentration. Japanese companies have accumulated strong capabilities in semiconductor packaging EMC, liquid molding compounds, MUF, and LCMUF, with products covering transfer molding, compression molding, liquid compression molding, wafer-level packaging, and panel-level packaging routes. Companies in Taiwan are building complementary positions around wafer-level liquid encapsulation materials, MUF packaging films, and localized advanced packaging materials, benefiting from the concentration of foundry, outsourced assembly, and AI server supply chains. Korean companies are strengthening R&D and adoption of MUF and high-thermal-conductivity EMC under the pull of memory and HBM packaging, creating an introduction path jointly driven by memory manufacturers, material suppliers, and equipment vendors. European and U.S. companies participate more through high-reliability underfill, encapsulant, and electronic adhesive systems, with strengths concentrated in automotive electronics, industrial electronics, and high-reliability electronic assemblies. Overall, the market has high supplier entry barriers, long customer qualification cycles, and strong stickiness after mass-production adoption. Leading material companies are more likely to maintain competitive advantages through joint development and long-term supply relationships.

The long-term demand logic is clear, driven mainly by chip packaging moving from two-dimensional planar interconnection toward high-density three-dimensional integration. AI computing chips, HBM, advanced mobile processors, RF front-end modules, automotive computing chips, and power modules impose higher requirements on package reliability, pushing underfill materials from auxiliary protective materials toward key materials affecting heat dissipation, structural stability, and yield. MUF can realize underfill and molding in one process, making it attractive for thin, compact, and high-

throughput packaging, especially for advanced packaging routes sensitive to cycle time, warpage, and voiding. Future industry growth will be driven by three forces. The first is the volume ramp of high-end packages for HBM and AI processors. The second is material form innovation enabled by wafer-level and panel-level packaging expansion. The third is the continued upgrade of high-reliability packaging materials for automotive and industrial electronics. As customers raise requirements for thermal management, low stress, low warpage, and low contamination, companies with formulation design, filler control, reliability databases, and global technical service capabilities will gain stronger pricing power.

This report is a detailed and comprehensive analysis for global Molded Underfill Materials market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Material Form 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 Molded Underfill Materials market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

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

Global Molded Underfill Materials market size and forecasts, by Material Form and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Molded Underfill Materials market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Molded Underfill Materials

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 Molded Underfill Materials 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 Panasonic Industry Co., Ltd., NAMICS Corporation, KYOCERA Corporation, Sanyu Rec Co., Ltd., Sumitomo Bakelite Co., Ltd., Nagase ChemteX Corporation, Resonac Corporation, Shin-Etsu Chemical Co., Ltd., Eternal Materials Co., Ltd., WaferChem Technology Corporation, etc.

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

Market Segmentation

Molded Underfill Materials market is split by Material Form and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Material Form, 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 Material Form

Liquid

Granular

Sheet

Film

Paste

Market segment by Resin System

Epoxy Resin

Polyurethane Modified

Other

Market segment by Molding Process

Transfer Molding

Compression Molding

Sheet-Film Lamination

Other

Market segment by Application

High-Performance Computing

AI Chips

High-Bandwidth Memory

Mobile Devices

Other

Major players covered

Panasonic Industry Co., Ltd.

NAMICS Corporation

KYOCERA Corporation

Sanyu Rec Co., Ltd.

Sumitomo Bakelite Co., Ltd.

Nagase ChemteX Corporation

Resonac Corporation

Shin-Etsu Chemical Co., Ltd.

Eternal Materials Co., Ltd.

WaferChem Technology Corporation

KCC Corporation

Samsung SDI Co., Ltd.

Henkel AG & Co. KGaA

Parker Hannifin Corporation

Zymet Inc.

H.B. Fuller Company

Ajinomoto Fine-Techno Co., Inc.

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 Molded Underfill Materials product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Molded Underfill Materials 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 Material Form and by Application, with sales market share and growth rate by Material Form, 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 Molded Underfill Materials market forecast, by regions, by Material Form, 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 Molded Underfill Materials.

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

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