

# Global Molded Underfill Materials Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Molded Underfill Materials market size is expected to reach \$ 12904 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

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 studies the global Molded Underfill Materials production, demand, key manufacturers, and key regions.

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

#### Highlights and key features of the study

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

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

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

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

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

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

Global Molded Underfill Materials production by Material Form, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global Molded Underfill Materials 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 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.

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Molded Underfill Materials Market, Segmentation by Material Form:

Liquid

Granular

Sheet

Film

Paste

#### Global Molded Underfill Materials Market, Segmentation by Resin System:

Epoxy Resin

Polyurethane Modified

Other

#### Global Molded Underfill Materials Market, Segmentation by Molding Process:

Transfer Molding

Compression Molding

Sheet-Film Lamination

Other

#### Global Molded Underfill Materials Market, Segmentation by Application:

High-Performance Computing

AI Chips

High-Bandwidth Memory

Mobile Devices

Other

Companies Profiled:

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.

Key Questions Answered:

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

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