

Global Molded Underfill (MUF) 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 (MUF) Materials market size was valued at US\$ 183 million in 2025 and is forecast to a readjusted size of US\$ 388 million by 2032 with a CAGR of 11.4% during review period.

Molded Underfill (MUF) Materials are a type of encapsulation material used in the semiconductor packaging process, particularly in advanced packaging technologies like Flip-Chip. They are applied to provide mechanical support, enhance thermal management, and improve the overall reliability of semiconductor devices. The industry's gross profit margin is around 40%-50%. In 2024, the global production of MUF materials was approximately 2,200 tons, with an average selling price of approximately US\$66 per kilogram. The upstream of the industry chain consists of raw material suppliers such as epoxy resin and fillers; the midstream consists of MUF material manufacturers; and the downstream covers semiconductor packaging and testing plants and end-user application manufacturers.

The main market drivers include:

Advanced Packaging Technology Upgrades Driving Explosive Demand

The evolution of semiconductor devices towards 3D integration and high-density stacking, along with processes like Flip-Chip, places stringent requirements on the thermal conductivity and mechanical stability of materials. MUF materials, through molding processes, achieve integrated filling and encapsulation, significantly improving device reliability and becoming a core material for high-end packaging such as HBM and AI chips. For example, NVIDIA's Blackwell architecture GPUs, after adopting MUF

packaging, achieved a 30% improvement in heat dissipation efficiency, helping computing power exceed 1000 TOPS. Technological iteration is driving the MUF market to extend from traditional FC packaging to system-in-package (SiP), with application scenarios continuously expanding.

High Computing Power and Low Power Consumption Demands Spur Material Innovation

The soaring computing power of smart devices and the increasing power density of data centers are driving demand for efficient heat dissipation materials. MUF materials' low moisture absorption and weather resistance meet the requirements of high-reliability fields such as automotive electronics and aerospace. Simultaneously, their molecular-level structure design supports multifunctional integration within nanometer-scale spaces, promoting widespread application in consumer electronics, communication infrastructure, and other fields. For example, after adopting MUF packaging, 5G base station chips experience a 15% reduction in power consumption and a 20% improvement in signal transmission stability, accelerating 5G network deployment.

Domestic substitution and cost optimization accelerate market penetration

Against the backdrop of Sino-US technology friction, domestic packaging and testing companies are accelerating the adoption of domestically produced MUF materials to reduce supply chain risks. Companies like Feikai Materials have broken the US-Japan monopoly through technological breakthroughs. Their GMC products are 20%-30% cheaper than imported materials, and their delivery cycle is shortened by 50%, driving the rapid penetration of MUF in the low-to-mid-end market. At the same time, the MUF process simplifies traditional multi-step packaging into a single step, increasing production efficiency by four times, helping packaging and testing companies reduce costs and increase efficiency, further expanding market application scale.

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

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

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

Global Molded Underfill (MUF) Materials 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 Molded Underfill (MUF) 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 (MUF) 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 NAMICS Corporation, Panasonic Corporation, WaferChem Technology, Shanghai Phichem Material, Kyocera, etc.

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

Market Segmentation

Molded Underfill (MUF) Materials market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and

forecasts for consumption value by Type, 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 Type

Liquid MUF

Film and Granule MUF

Market segment by Product Forms

Liquid

Solid

Market segment by Application Scenarios

System-on-a-Chip (SoC) Packaging

HBM Memory Chip Packaging

AI Chip Packaging

Market segment by Application

SoC Chip

HBM

Others

Major players covered

NAMICS Corporation

Panasonic Corporation

WaferChem Technology

Shanghai Phichem Material

Kyocera

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 (MUF) Materials product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Molded Underfill (MUF) 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 Type and by Application, with sales market share and growth rate by Type, 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 (MUF) Materials market forecast, by regions, by Type, 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 (MUF) Materials.

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

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