

Global PCB Underfill Encapsulants 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 PCB Underfill Encapsulants market size was valued at US\$ 374 million in 2025 and is forecast to a readjusted size of US\$ 526 million by 2032 with a CAGR of 5.0% during review period.

PCB Underfill Encapsulants are electronic packaging protection materials used to fill the narrow gap between packaged semiconductor devices and printed circuit boards. They are applied through capillary flow, edge bonding, corner bonding, or no-flow processes under BGA, CSP, WLCSP, LGA, flip-chip, and similar area-array devices, and form a continuous insulating protection layer after curing. Their primary function is to redistribute thermomechanical stress on solder joints, reduce fatigue risks caused by drop impact, vibration, thermal cycling, and humid heat, and improve board-level interconnect reliability, impact resistance, and long-term operating stability.

PCB Underfill Encapsulants are mainly based on one-component epoxy systems, combined with low-CTE fillers such as silica, latent curing agents, rheology modifiers, and low-ionic-contamination control systems. Commercial products are typically supplied in syringes, cartridges, or prepacked dispensing formats. Major production and technology supply regions include Japan, the United States, Germany, China, and Taiwan, with applications across smartphones, wearable devices, automotive electronic control modules, servers, communication equipment, industrial controls, medical electronics, and high-reliability electronic assemblies.

In 2025, global PCB Underfill Encapsulants production reached approximately 2,900 to 3,300 metric tons, with mainstream FOB average prices at around USD 110 to USD 130 per kilogram. Standard capillary-flow products for consumer electronics and

communication equipment were priced at the lower end of the range, while low-ionic, low-CTE, fast-curing, reworkable, or high-reliability grades for automotive electronics, BGA/CSP, and fine-pitch WLCSP applications commanded higher prices. Overall industry pricing was mainly affected by epoxy resin costs, spherical silica fillers, low-ionic purification requirements, customer qualification cycles, and small-batch high-specification orders.

The growth of PCB Underfill Encapsulants is primarily driven by electronic miniaturization, high-density packaging, and rising reliability requirements for board-level interconnects. As BGA, CSP, WLCSP, flip-chip, and system-level modules gain broader adoption in smartphones, wearable devices, automotive control units, servers, communication equipment, and industrial controls, solder joints are becoming smaller, package gaps are narrowing, and thermomechanical stress concentration is becoming more severe. Underfill materials are therefore shifting from optional reliability-enhancement materials to critical process materials. Automotive electronics and high-performance computing represent the clearest growth areas, with automotive applications requiring stricter validation for thermal cycling, drop impact, vibration, humid heat, and long-term aging, while computing applications push materials toward lower CTE, faster flow, lower voiding, lower ionic contamination, and higher Tg.

The main market challenges include long qualification cycles, high customer-entry barriers, narrow process windows, and concentration of high-end formulation capabilities. Underfill materials must balance flowability, curing speed, solder-joint stress relief, ionic cleanliness, reworkability, humid-heat resistance, and dispensing consistency, creating substantial formulation trade-offs. High-reliability customers usually require extended validation programs, and supplier switching costs are relatively high, giving established material leaders strong customer stickiness in automotive, communication, and premium consumer electronics accounts. At the same time, the migration of electronics manufacturing toward East Asia and Southeast Asia is creating regional supply opportunities. Chinese material suppliers are accelerating substitution in mid-range consumer electronics, module assembly, and selected automotive electronics programs, although further progress is still required in high-reliability, ultra-fine-pitch, and global customer qualification projects.

This report is a detailed and comprehensive analysis for global PCB Underfill Encapsulants 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 PCB Underfill Encapsulants market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

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

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

Global PCB Underfill Encapsulants 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 PCB Underfill Encapsulants

- 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 PCB Underfill Encapsulants 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 Henkel AG & Co. KGaA, NAMICS Corporation, Panasonic Industry Co., Ltd., Resonac Corporation, Shin-Etsu Chemical Co., Ltd., Sanyu Rec Co., Ltd., ThreeBond Co., Ltd., H.B. Fuller Company, Parker Hannifin Corporation, Master Bond Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

PCB Underfill Encapsulants 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

Epoxy Based Underfill

Acrylic Based Underfill

Others

Market segment by Package Type

BGA and CSP Packages

WLCSP Packages

Flip Chip Packages

Others

Market segment by Cure Mechanism

Thermal Cure Underfill

Dual Cure Underfill

Ultraviolet Cure Underfill

Others

Market segment by Underfill Process

Capillary Flow Full Underfill

Edge and Corner Bond Underfill

No Flow Underfill

Others

Market segment by Application

Consumer Electronics

Automotive Electronics

Computing and Communications

Others

Major players covered

Henkel AG & Co. KGaA

NAMICS Corporation

Panasonic Industry Co., Ltd.

Resonac Corporation

Shin-Etsu Chemical Co., Ltd.

Sanyu Rec Co., Ltd.

ThreeBond Co., Ltd.

H.B. Fuller Company

Parker Hannifin Corporation

Master Bond Inc.

Zymet Inc.

AI Technology, Inc.

Meridian Adhesives Group

Epoxyset Inc.

YINCAE Advanced Materials, LLC

Panacol-Elosol GmbH

Protavic International

Roartis BV

Everwide Chemical Co., Ltd.

Eternal Materials Co., Ltd.

Darbond Technology Co., Ltd.

Hubei Huitian New Materials Co., Ltd.

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 PCB Underfill Encapsulants product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the PCB Underfill Encapsulants 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 PCB Underfill Encapsulants 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 PCB Underfill Encapsulants.

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

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