

Global PCB Underfill Encapsulants Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PCB Underfill Encapsulants market size is expected to reach \$ 526 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

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 studies the global PCB Underfill Encapsulants production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global PCB Underfill Encapsulants total production and demand, 2021-2032, (Tons)

Global PCB Underfill Encapsulants total production value, 2021-2032, (USD Million)

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

Global PCB Underfill Encapsulants consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: PCB Underfill Encapsulants domestic production, consumption, key domestic manufacturers and share

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

Global PCB Underfill Encapsulants production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global PCB Underfill Encapsulants 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PCB Underfill Encapsulants 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 PCB Underfill Encapsulants Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PCB Underfill Encapsulants Market, Segmentation by Type:

Epoxy Based Underfill

Acrylic Based Underfill

Others

Global PCB Underfill Encapsulants Market, Segmentation by Package Type:

BGA and CSP Packages

WLCSP Packages

Flip Chip Packages

Others

Global PCB Underfill Encapsulants Market, Segmentation by Cure Mechanism:

Thermal Cure Underfill

Dual Cure Underfill

Ultraviolet Cure Underfill

Others

Global PCB Underfill Encapsulants Market, Segmentation by Underfill Process:

Capillary Flow Full Underfill

Edge and Corner Bond Underfill

No Flow Underfill

Others

Global PCB Underfill Encapsulants Market, Segmentation by Application:

Consumer Electronics

Automotive Electronics

Computing and Communications

Others

Companies Profiled:

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.

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 PCB Underfill Encapsulants Introduction
- 1.2 World PCB Underfill Encapsulants Supply & Forecast
 - 1.2.1 World PCB Underfill Encapsulants Production Value (2021 & 2025 & 2032)
 - 1.2.2 World PCB Underfill Encapsulants Production (2021-2032)
 - 1.2.3 World PCB Underfill Encapsulants Pricing Trends (2021-2032)
- 1.3 World PCB Underfill Encapsulants Production by Region (Based on Production Site)
 - 1.3.1 World PCB Underfill Encapsulants Production Value by Region (2021-2032)
 - 1.3.2 World PCB Underfill Encapsulants Production by Region (2021-2032)
 - 1.3.3 World PCB Underfill Encapsulants Average Price by Region (2021-2032)
 - 1.3.4 North America PCB Underfill Encapsulants Production (2021-2032)
 - 1.3.5 Europe PCB Underfill Encapsulants Production (2021-2032)
 - 1.3.6 China PCB Underfill Encapsulants Production (2021-2032)
 - 1.3.7 Japan PCB Underfill Encapsulants Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 PCB Underfill Encapsulants Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 PCB Underfill Encapsulants Major Market Trends

2 DEMAND SUMMARY

- 2.1 World PCB Underfill Encapsulants Demand (2021-2032)
- 2.2 World PCB Underfill Encapsulants Consumption by Region
 - 2.2.1 World PCB Underfill Encapsulants Consumption by Region (2021-2026)
 - 2.2.2 World PCB Underfill Encapsulants Consumption Forecast by Region (2027-2032)
- 2.3 United States PCB Underfill Encapsulants Consumption (2021-2032)
- 2.4 China PCB Underfill Encapsulants Consumption (2021-2032)
- 2.5 Europe PCB Underfill Encapsulants Consumption (2021-2032)
- 2.6 Japan PCB Underfill Encapsulants Consumption (2021-2032)
- 2.7 South Korea PCB Underfill Encapsulants Consumption (2021-2032)
- 2.8 ASEAN PCB Underfill Encapsulants Consumption (2021-2032)
- 2.9 India PCB Underfill Encapsulants Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World PCB Underfill Encapsulants Production Value by Manufacturer (2021-2026)
- 3.2 World PCB Underfill Encapsulants Production by Manufacturer (2021-2026)
- 3.3 World PCB Underfill Encapsulants Average Price by Manufacturer (2021-2026)
- 3.4 PCB Underfill Encapsulants Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global PCB Underfill Encapsulants Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for PCB Underfill Encapsulants in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for PCB Underfill Encapsulants in 2025
- 3.6 PCB Underfill Encapsulants Market: Overall Company Footprint Analysis
 - 3.6.1 PCB Underfill Encapsulants Market: Region Footprint
 - 3.6.2 PCB Underfill Encapsulants Market: Company Product Type Footprint
 - 3.6.3 PCB Underfill Encapsulants Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: PCB Underfill Encapsulants Production Value Comparison
 - 4.1.1 United States VS China: PCB Underfill Encapsulants Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: PCB Underfill Encapsulants Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: PCB Underfill Encapsulants Production Comparison
 - 4.2.1 United States VS China: PCB Underfill Encapsulants Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: PCB Underfill Encapsulants Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: PCB Underfill Encapsulants Consumption Comparison
 - 4.3.1 United States VS China: PCB Underfill Encapsulants Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: PCB Underfill Encapsulants Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based PCB Underfill Encapsulants Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based PCB Underfill Encapsulants Manufacturers, Headquarters

and Production Site (States, Country)

4.4.2 United States Based Manufacturers PCB Underfill Encapsulants Production Value (2021-2026)

4.4.3 United States Based Manufacturers PCB Underfill Encapsulants Production (2021-2026)

4.5 China Based PCB Underfill Encapsulants Manufacturers and Market Share

4.5.1 China Based PCB Underfill Encapsulants Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers PCB Underfill Encapsulants Production Value (2021-2026)

4.5.3 China Based Manufacturers PCB Underfill Encapsulants Production (2021-2026)

4.6 Rest of World Based PCB Underfill Encapsulants Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based PCB Underfill Encapsulants Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers PCB Underfill Encapsulants Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers PCB Underfill Encapsulants Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World PCB Underfill Encapsulants Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Epoxy Based Underfill

5.2.2 Acrylic Based Underfill

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World PCB Underfill Encapsulants Production by Type (2021-2032)

5.3.2 World PCB Underfill Encapsulants Production Value by Type (2021-2032)

5.3.3 World PCB Underfill Encapsulants Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PACKAGE TYPE

6.1 World PCB Underfill Encapsulants Market Size Overview by Package Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Package Type

6.2.1 BGA and CSP Packages

6.2.2 WLCSP Packages

6.2.3 Flip Chip Packages

6.2.4 Others

6.3 Market Segment by Package Type

6.3.1 World PCB Underfill Encapsulants Production by Package Type (2021-2032)

6.3.2 World PCB Underfill Encapsulants Production Value by Package Type
(2021-2032)

6.3.3 World PCB Underfill Encapsulants Average Price by Package Type (2021-2032)

7 MARKET ANALYSIS BY CURE MECHANISM

7.1 World PCB Underfill Encapsulants Market Size Overview by Cure Mechanism: 2021
VS 2025 VS 2032

7.2 Segment Introduction by Cure Mechanism

7.2.1 Thermal Cure Underfill

7.2.2 Dual Cure Underfill

7.2.3 Ultraviolet Cure Underfill

7.2.4 Others

7.3 Market Segment by Cure Mechanism

7.3.1 World PCB Underfill Encapsulants Production by Cure Mechanism (2021-2032)

7.3.2 World PCB Underfill Encapsulants Production Value by Cure Mechanism
(2021-2032)

7.3.3 World PCB Underfill Encapsulants Average Price by Cure Mechanism
(2021-2032)

8 MARKET ANALYSIS BY UNDERFILL PROCESS

8.1 World PCB Underfill Encapsulants Market Size Overview by Underfill Process: 2021
VS 2025 VS 2032

8.2 Segment Introduction by Underfill Process

8.2.1 Capillary Flow Full Underfill

8.2.2 Edge and Corner Bond Underfill

8.2.3 No Flow Underfill

8.2.4 Others

8.3 Market Segment by Underfill Process

8.3.1 World PCB Underfill Encapsulants Production by Underfill Process (2021-2032)

8.3.2 World PCB Underfill Encapsulants Production Value by Underfill Process
(2021-2032)

8.3.3 World PCB Underfill Encapsulants Average Price by Underfill Process

(2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World PCB Underfill Encapsulants Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Consumer Electronics

9.2.2 Automotive Electronics

9.2.3 Computing and Communications

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World PCB Underfill Encapsulants Production by Application (2021-2032)

9.3.2 World PCB Underfill Encapsulants Production Value by Application (2021-2032)

9.3.3 World PCB Underfill Encapsulants Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Henkel AG & Co. KGaA

10.1.1 Henkel AG & Co. KGaA Details

10.1.2 Henkel AG & Co. KGaA Major Business

10.1.3 Henkel AG & Co. KGaA PCB Underfill Encapsulants Product and Services

10.1.4 Henkel AG & Co. KGaA PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Henkel AG & Co. KGaA Recent Developments/Updates

10.1.6 Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

10.2 NAMICS Corporation

10.2.1 NAMICS Corporation Details

10.2.2 NAMICS Corporation Major Business

10.2.3 NAMICS Corporation PCB Underfill Encapsulants Product and Services

10.2.4 NAMICS Corporation PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 NAMICS Corporation Recent Developments/Updates

10.2.6 NAMICS Corporation Competitive Strengths & Weaknesses

10.3 Panasonic Industry Co., Ltd.

10.3.1 Panasonic Industry Co., Ltd. Details

10.3.2 Panasonic Industry Co., Ltd. Major Business

10.3.3 Panasonic Industry Co., Ltd. PCB Underfill Encapsulants Product and Services

10.3.4 Panasonic Industry Co., Ltd. PCB Underfill Encapsulants Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.3.5 Panasonic Industry Co., Ltd. Recent Developments/Updates

10.3.6 Panasonic Industry Co., Ltd. Competitive Strengths & Weaknesses

10.4 Resonac Corporation

10.4.1 Resonac Corporation Details

10.4.2 Resonac Corporation Major Business

10.4.3 Resonac Corporation PCB Underfill Encapsulants Product and Services

10.4.4 Resonac Corporation PCB Underfill Encapsulants Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.4.5 Resonac Corporation Recent Developments/Updates

10.4.6 Resonac Corporation Competitive Strengths & Weaknesses

10.5 Shin-Etsu Chemical Co., Ltd.

10.5.1 Shin-Etsu Chemical Co., Ltd. Details

10.5.2 Shin-Etsu Chemical Co., Ltd. Major Business

10.5.3 Shin-Etsu Chemical Co., Ltd. PCB Underfill Encapsulants Product and Services

10.5.4 Shin-Etsu Chemical Co., Ltd. PCB Underfill Encapsulants Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.5.5 Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

10.5.6 Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.6 Sanyu Rec Co., Ltd.

10.6.1 Sanyu Rec Co., Ltd. Details

10.6.2 Sanyu Rec Co., Ltd. Major Business

10.6.3 Sanyu Rec Co., Ltd. PCB Underfill Encapsulants Product and Services

10.6.4 Sanyu Rec Co., Ltd. PCB Underfill Encapsulants Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.6.5 Sanyu Rec Co., Ltd. Recent Developments/Updates

10.6.6 Sanyu Rec Co., Ltd. Competitive Strengths & Weaknesses

10.7 ThreeBond Co., Ltd.

10.7.1 ThreeBond Co., Ltd. Details

10.7.2 ThreeBond Co., Ltd. Major Business

10.7.3 ThreeBond Co., Ltd. PCB Underfill Encapsulants Product and Services

10.7.4 ThreeBond Co., Ltd. PCB Underfill Encapsulants Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.7.5 ThreeBond Co., Ltd. Recent Developments/Updates

10.7.6 ThreeBond Co., Ltd. Competitive Strengths & Weaknesses

10.8 H.B. Fuller Company

10.8.1 H.B. Fuller Company Details

10.8.2 H.B. Fuller Company Major Business

10.8.3 H.B. Fuller Company PCB Underfill Encapsulants Product and Services

10.8.4 H.B. Fuller Company PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.8.5 H.B. Fuller Company Recent Developments/Updates

10.8.6 H.B. Fuller Company Competitive Strengths & Weaknesses

10.9 Parker Hannifin Corporation

10.9.1 Parker Hannifin Corporation Details

10.9.2 Parker Hannifin Corporation Major Business

10.9.3 Parker Hannifin Corporation PCB Underfill Encapsulants Product and Services

10.9.4 Parker Hannifin Corporation PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.9.5 Parker Hannifin Corporation Recent Developments/Updates

10.9.6 Parker Hannifin Corporation Competitive Strengths & Weaknesses

10.10 Master Bond Inc.

10.10.1 Master Bond Inc. Details

10.10.2 Master Bond Inc. Major Business

10.10.3 Master Bond Inc. PCB Underfill Encapsulants Product and Services

10.10.4 Master Bond Inc. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 Master Bond Inc. Recent Developments/Updates

10.10.6 Master Bond Inc. Competitive Strengths & Weaknesses

10.11 Zymet Inc.

10.11.1 Zymet Inc. Details

10.11.2 Zymet Inc. Major Business

10.11.3 Zymet Inc. PCB Underfill Encapsulants Product and Services

10.11.4 Zymet Inc. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 Zymet Inc. Recent Developments/Updates

10.11.6 Zymet Inc. Competitive Strengths & Weaknesses

10.12 AI Technology, Inc.

10.12.1 AI Technology, Inc. Details

10.12.2 AI Technology, Inc. Major Business

10.12.3 AI Technology, Inc. PCB Underfill Encapsulants Product and Services

10.12.4 AI Technology, Inc. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 AI Technology, Inc. Recent Developments/Updates

10.12.6 AI Technology, Inc. Competitive Strengths & Weaknesses

10.13 Meridian Adhesives Group

10.13.1 Meridian Adhesives Group Details

10.13.2 Meridian Adhesives Group Major Business

- 10.13.3 Meridian Adhesives Group PCB Underfill Encapsulants Product and Services
- 10.13.4 Meridian Adhesives Group PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.13.5 Meridian Adhesives Group Recent Developments/Updates
- 10.13.6 Meridian Adhesives Group Competitive Strengths & Weaknesses
- 10.14 Epoxyset Inc.
 - 10.14.1 Epoxyset Inc. Details
 - 10.14.2 Epoxyset Inc. Major Business
 - 10.14.3 Epoxyset Inc. PCB Underfill Encapsulants Product and Services
 - 10.14.4 Epoxyset Inc. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.14.5 Epoxyset Inc. Recent Developments/Updates
 - 10.14.6 Epoxyset Inc. Competitive Strengths & Weaknesses
- 10.15 YINCAE Advanced Materials, LLC
 - 10.15.1 YINCAE Advanced Materials, LLC Details
 - 10.15.2 YINCAE Advanced Materials, LLC Major Business
 - 10.15.3 YINCAE Advanced Materials, LLC PCB Underfill Encapsulants Product and Services
 - 10.15.4 YINCAE Advanced Materials, LLC PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.15.5 YINCAE Advanced Materials, LLC Recent Developments/Updates
 - 10.15.6 YINCAE Advanced Materials, LLC Competitive Strengths & Weaknesses
- 10.16 Panacol-Elosol GmbH
 - 10.16.1 Panacol-Elosol GmbH Details
 - 10.16.2 Panacol-Elosol GmbH Major Business
 - 10.16.3 Panacol-Elosol GmbH PCB Underfill Encapsulants Product and Services
 - 10.16.4 Panacol-Elosol GmbH PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.16.5 Panacol-Elosol GmbH Recent Developments/Updates
 - 10.16.6 Panacol-Elosol GmbH Competitive Strengths & Weaknesses
- 10.17 Protavic International
 - 10.17.1 Protavic International Details
 - 10.17.2 Protavic International Major Business
 - 10.17.3 Protavic International PCB Underfill Encapsulants Product and Services
 - 10.17.4 Protavic International PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 Protavic International Recent Developments/Updates
 - 10.17.6 Protavic International Competitive Strengths & Weaknesses
- 10.18 Roartis BV

- 10.18.1 Roartis BV Details
- 10.18.2 Roartis BV Major Business
- 10.18.3 Roartis BV PCB Underfill Encapsulants Product and Services
- 10.18.4 Roartis BV PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.18.5 Roartis BV Recent Developments/Updates
- 10.18.6 Roartis BV Competitive Strengths & Weaknesses
- 10.19 Everwide Chemical Co., Ltd.
 - 10.19.1 Everwide Chemical Co., Ltd. Details
 - 10.19.2 Everwide Chemical Co., Ltd. Major Business
 - 10.19.3 Everwide Chemical Co., Ltd. PCB Underfill Encapsulants Product and Services
 - 10.19.4 Everwide Chemical Co., Ltd. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.19.5 Everwide Chemical Co., Ltd. Recent Developments/Updates
 - 10.19.6 Everwide Chemical Co., Ltd. Competitive Strengths & Weaknesses
- 10.20 Eternal Materials Co., Ltd.
 - 10.20.1 Eternal Materials Co., Ltd. Details
 - 10.20.2 Eternal Materials Co., Ltd. Major Business
 - 10.20.3 Eternal Materials Co., Ltd. PCB Underfill Encapsulants Product and Services
 - 10.20.4 Eternal Materials Co., Ltd. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.20.5 Eternal Materials Co., Ltd. Recent Developments/Updates
 - 10.20.6 Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
- 10.21 Darbond Technology Co., Ltd.
 - 10.21.1 Darbond Technology Co., Ltd. Details
 - 10.21.2 Darbond Technology Co., Ltd. Major Business
 - 10.21.3 Darbond Technology Co., Ltd. PCB Underfill Encapsulants Product and Services
 - 10.21.4 Darbond Technology Co., Ltd. PCB Underfill Encapsulants Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.21.5 Darbond Technology Co., Ltd. Recent Developments/Updates
 - 10.21.6 Darbond Technology Co., Ltd. Competitive Strengths & Weaknesses
- 10.22 Hubei Huitian New Materials Co., Ltd.
 - 10.22.1 Hubei Huitian New Materials Co., Ltd. Details
 - 10.22.2 Hubei Huitian New Materials Co., Ltd. Major Business
 - 10.22.3 Hubei Huitian New Materials Co., Ltd. PCB Underfill Encapsulants Product and Services
 - 10.22.4 Hubei Huitian New Materials Co., Ltd. PCB Underfill Encapsulants Production,

Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Hubei Huitian New Materials Co., Ltd. Recent Developments/Updates

10.22.6 Hubei Huitian New Materials Co., Ltd. Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 PCB Underfill Encapsulants Industry Chain

11.2 PCB Underfill Encapsulants Upstream Analysis

11.2.1 PCB Underfill Encapsulants Core Raw Materials

11.2.2 Main Manufacturers of PCB Underfill Encapsulants Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 PCB Underfill Encapsulants Production Mode

11.6 PCB Underfill Encapsulants Procurement Model

11.7 PCB Underfill Encapsulants Industry Sales Model and Sales Channels

11.7.1 PCB Underfill Encapsulants Sales Model

11.7.2 PCB Underfill Encapsulants Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World PCB Underfill Encapsulants Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World PCB Underfill Encapsulants Production Value by Region (2021-2026) & (USD Million)

Table 3. World PCB Underfill Encapsulants Production Value by Region (2027-2032) & (USD Million)

Table 4. World PCB Underfill Encapsulants Production Value Market Share by Region (2021-2026)

Table 5. World PCB Underfill Encapsulants Production Value Market Share by Region (2027-2032)

Table 6. World PCB Underfill Encapsulants Production by Region (2021-2026) & (Tons)

Table 7. World PCB Underfill Encapsulants Production by Region (2027-2032) & (Tons)

Table 8. World PCB Underfill Encapsulants Production Market Share by Region (2021-2026)

Table 9. World PCB Underfill Encapsulants Production Market Share by Region (2027-2032)

Table 10. World PCB Underfill Encapsulants Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World PCB Underfill Encapsulants Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. PCB Underfill Encapsulants Major Market Trends

Table 13. World PCB Underfill Encapsulants Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World PCB Underfill Encapsulants Consumption by Region (2021-2026) & (Tons)

Table 15. World PCB Underfill Encapsulants Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World PCB Underfill Encapsulants Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key PCB Underfill Encapsulants Producers in 2025

Table 18. World PCB Underfill Encapsulants Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key PCB Underfill Encapsulants Producers in 2025

Table 20. World PCB Underfill Encapsulants Average Price by Manufacturer (2021-2026) & (US\$/Ton)
Table 21. Global PCB Underfill Encapsulants Company Evaluation Quadrant
Table 22. World PCB Underfill Encapsulants Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and PCB Underfill Encapsulants Production Site of Key Manufacturer
Table 24. PCB Underfill Encapsulants Market: Company Product Type Footprint
Table 25. PCB Underfill Encapsulants Market: Company Product Application Footprint
Table 26. PCB Underfill Encapsulants Competitive Factors
Table 27. PCB Underfill Encapsulants New Entrant and Capacity Expansion Plans
Table 28. PCB Underfill Encapsulants Mergers & Acquisitions Activity
Table 29. United States VS China PCB Underfill Encapsulants Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China PCB Underfill Encapsulants Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China PCB Underfill Encapsulants Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based PCB Underfill Encapsulants Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers PCB Underfill Encapsulants Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers PCB Underfill Encapsulants Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers PCB Underfill Encapsulants Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers PCB Underfill Encapsulants Production Market Share (2021-2026)
Table 37. China Based PCB Underfill Encapsulants Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers PCB Underfill Encapsulants Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers PCB Underfill Encapsulants Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers PCB Underfill Encapsulants Production, (2021-2026) & (Tons)
Table 41. China Based Manufacturers PCB Underfill Encapsulants Production Market Share (2021-2026)
Table 42. Rest of World Based PCB Underfill Encapsulants Manufacturers,

Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers PCB Underfill Encapsulants Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers PCB Underfill Encapsulants Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers PCB Underfill Encapsulants Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers PCB Underfill Encapsulants Production Market Share (2021-2026)

Table 47. World PCB Underfill Encapsulants Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World PCB Underfill Encapsulants Production by Type (2021-2026) & (Tons)

Table 49. World PCB Underfill Encapsulants Production by Type (2027-2032) & (Tons)

Table 50. World PCB Underfill Encapsulants Production Value by Type (2021-2026) & (USD Million)

Table 51. World PCB Underfill Encapsulants Production Value by Type (2027-2032) & (USD Million)

Table 52. World PCB Underfill Encapsulants Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World PCB Underfill Encapsulants Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World PCB Underfill Encapsulants Production Value by Package Type, (USD Million), 2021 & 2025 & 2032

Table 55. World PCB Underfill Encapsulants Production by Package Type (2021-2026) & (Tons)

Table 56. World PCB Underfill Encapsulants Production by Package Type (2027-2032) & (Tons)

Table 57. World PCB Underfill Encapsulants Production Value by Package Type (2021-2026) & (USD Million)

Table 58. World PCB Underfill Encapsulants Production Value by Package Type (2027-2032) & (USD Million)

Table 59. World PCB Underfill Encapsulants Average Price by Package Type (2021-2026) & (US\$/Ton)

Table 60. World PCB Underfill Encapsulants Average Price by Package Type (2027-2032) & (US\$/Ton)

Table 61. World PCB Underfill Encapsulants Production Value by Cure Mechanism, (USD Million), 2021 & 2025 & 2032

Table 62. World PCB Underfill Encapsulants Production by Cure Mechanism (2021-2026) & (Tons)

Table 63. World PCB Underfill Encapsulants Production by Cure Mechanism (2027-2032) & (Tons)

Table 64. World PCB Underfill Encapsulants Production Value by Cure Mechanism (2021-2026) & (USD Million)

Table 65. World PCB Underfill Encapsulants Production Value by Cure Mechanism (2027-2032) & (USD Million)

Table 66. World PCB Underfill Encapsulants Average Price by Cure Mechanism (2021-2026) & (US\$/Ton)

Table 67. World PCB Underfill Encapsulants Average Price by Cure Mechanism (2027-2032) & (US\$/Ton)

Table 68. World PCB Underfill Encapsulants Production Value by Underfill Process, (USD Million), 2021 & 2025 & 2032

Table 69. World PCB Underfill Encapsulants Production by Underfill Process (2021-2026) & (Tons)

Table 70. World PCB Underfill Encapsulants Production by Underfill Process (2027-2032) & (Tons)

Table 71. World PCB Underfill Encapsulants Production Value by Underfill Process (2021-2026) & (USD Million)

Table 72. World PCB Underfill Encapsulants Production Value by Underfill Process (2027-2032) & (USD Million)

Table 73. World PCB Underfill Encapsulants Average Price by Underfill Process (2021-2026) & (US\$/Ton)

Table 74. World PCB Underfill Encapsulants Average Price by Underfill Process (2027-2032) & (US\$/Ton)

Table 75. World PCB Underfill Encapsulants Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World PCB Underfill Encapsulants Production by Application (2021-2026) & (Tons)

Table 77. World PCB Underfill Encapsulants Production by Application (2027-2032) & (Tons)

Table 78. World PCB Underfill Encapsulants Production Value by Application (2021-2026) & (USD Million)

Table 79. World PCB Underfill Encapsulants Production Value by Application (2027-2032) & (USD Million)

Table 80. World PCB Underfill Encapsulants Average Price by Application (2021-2026) & (US\$/Ton)

Table 81. World PCB Underfill Encapsulants Average Price by Application (2027-2032) & (US\$/Ton)

Table 82. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and

Competitors

Table 83. Henkel AG & Co. KGaA Major Business

Table 84. Henkel AG & Co. KGaA PCB Underfill Encapsulants Product and Services

Table 85. Henkel AG & Co. KGaA PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Henkel AG & Co. KGaA Recent Developments/Updates

Table 87. Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

Table 88. NAMICS Corporation Basic Information, Manufacturing Base and Competitors

Table 89. NAMICS Corporation Major Business

Table 90. NAMICS Corporation PCB Underfill Encapsulants Product and Services

Table 91. NAMICS Corporation PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. NAMICS Corporation Recent Developments/Updates

Table 93. NAMICS Corporation Competitive Strengths & Weaknesses

Table 94. Panasonic Industry Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 95. Panasonic Industry Co., Ltd. Major Business

Table 96. Panasonic Industry Co., Ltd. PCB Underfill Encapsulants Product and Services

Table 97. Panasonic Industry Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Panasonic Industry Co., Ltd. Recent Developments/Updates

Table 99. Panasonic Industry Co., Ltd. Competitive Strengths & Weaknesses

Table 100. Resonac Corporation Basic Information, Manufacturing Base and Competitors

Table 101. Resonac Corporation Major Business

Table 102. Resonac Corporation PCB Underfill Encapsulants Product and Services

Table 103. Resonac Corporation PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Resonac Corporation Recent Developments/Updates

Table 105. Resonac Corporation Competitive Strengths & Weaknesses

Table 106. Shin-Etsu Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 107. Shin-Etsu Chemical Co., Ltd. Major Business

Table 108. Shin-Etsu Chemical Co., Ltd. PCB Underfill Encapsulants Product and

Services

Table 109. Shin-Etsu Chemical Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

Table 111. Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 112. Sanyu Rec Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 113. Sanyu Rec Co., Ltd. Major Business

Table 114. Sanyu Rec Co., Ltd. PCB Underfill Encapsulants Product and Services

Table 115. Sanyu Rec Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Sanyu Rec Co., Ltd. Recent Developments/Updates

Table 117. Sanyu Rec Co., Ltd. Competitive Strengths & Weaknesses

Table 118. ThreeBond Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 119. ThreeBond Co., Ltd. Major Business

Table 120. ThreeBond Co., Ltd. PCB Underfill Encapsulants Product and Services

Table 121. ThreeBond Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. ThreeBond Co., Ltd. Recent Developments/Updates

Table 123. ThreeBond Co., Ltd. Competitive Strengths & Weaknesses

Table 124. H.B. Fuller Company Basic Information, Manufacturing Base and Competitors

Table 125. H.B. Fuller Company Major Business

Table 126. H.B. Fuller Company PCB Underfill Encapsulants Product and Services

Table 127. H.B. Fuller Company PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. H.B. Fuller Company Recent Developments/Updates

Table 129. H.B. Fuller Company Competitive Strengths & Weaknesses

Table 130. Parker Hannifin Corporation Basic Information, Manufacturing Base and Competitors

Table 131. Parker Hannifin Corporation Major Business

Table 132. Parker Hannifin Corporation PCB Underfill Encapsulants Product and Services

Table 133. Parker Hannifin Corporation PCB Underfill Encapsulants Production (Tons),

Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Parker Hannifin Corporation Recent Developments/Updates

Table 135. Parker Hannifin Corporation Competitive Strengths & Weaknesses

Table 136. Master Bond Inc. Basic Information, Manufacturing Base and Competitors

Table 137. Master Bond Inc. Major Business

Table 138. Master Bond Inc. PCB Underfill Encapsulants Product and Services

Table 139. Master Bond Inc. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Master Bond Inc. Recent Developments/Updates

Table 141. Master Bond Inc. Competitive Strengths & Weaknesses

Table 142. Zymet Inc. Basic Information, Manufacturing Base and Competitors

Table 143. Zymet Inc. Major Business

Table 144. Zymet Inc. PCB Underfill Encapsulants Product and Services

Table 145. Zymet Inc. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Zymet Inc. Recent Developments/Updates

Table 147. Zymet Inc. Competitive Strengths & Weaknesses

Table 148. AI Technology, Inc. Basic Information, Manufacturing Base and Competitors

Table 149. AI Technology, Inc. Major Business

Table 150. AI Technology, Inc. PCB Underfill Encapsulants Product and Services

Table 151. AI Technology, Inc. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. AI Technology, Inc. Recent Developments/Updates

Table 153. AI Technology, Inc. Competitive Strengths & Weaknesses

Table 154. Meridian Adhesives Group Basic Information, Manufacturing Base and Competitors

Table 155. Meridian Adhesives Group Major Business

Table 156. Meridian Adhesives Group PCB Underfill Encapsulants Product and Services

Table 157. Meridian Adhesives Group PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Meridian Adhesives Group Recent Developments/Updates

Table 159. Meridian Adhesives Group Competitive Strengths & Weaknesses

Table 160. Epoxysset Inc. Basic Information, Manufacturing Base and Competitors

Table 161. Epoxysset Inc. Major Business

- Table 162. Epoxyset Inc. PCB Underfill Encapsulants Product and Services
- Table 163. Epoxyset Inc. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 164. Epoxyset Inc. Recent Developments/Updates
- Table 165. Epoxyset Inc. Competitive Strengths & Weaknesses
- Table 166. YINCAE Advanced Materials, LLC Basic Information, Manufacturing Base and Competitors
- Table 167. YINCAE Advanced Materials, LLC Major Business
- Table 168. YINCAE Advanced Materials, LLC PCB Underfill Encapsulants Product and Services
- Table 169. YINCAE Advanced Materials, LLC PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 170. YINCAE Advanced Materials, LLC Recent Developments/Updates
- Table 171. YINCAE Advanced Materials, LLC Competitive Strengths & Weaknesses
- Table 172. Panacol-Elosol GmbH Basic Information, Manufacturing Base and Competitors
- Table 173. Panacol-Elosol GmbH Major Business
- Table 174. Panacol-Elosol GmbH PCB Underfill Encapsulants Product and Services
- Table 175. Panacol-Elosol GmbH PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 176. Panacol-Elosol GmbH Recent Developments/Updates
- Table 177. Panacol-Elosol GmbH Competitive Strengths & Weaknesses
- Table 178. Protavic International Basic Information, Manufacturing Base and Competitors
- Table 179. Protavic International Major Business
- Table 180. Protavic International PCB Underfill Encapsulants Product and Services
- Table 181. Protavic International PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 182. Protavic International Recent Developments/Updates
- Table 183. Protavic International Competitive Strengths & Weaknesses
- Table 184. Roartis BV Basic Information, Manufacturing Base and Competitors
- Table 185. Roartis BV Major Business
- Table 186. Roartis BV PCB Underfill Encapsulants Product and Services
- Table 187. Roartis BV PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Roartis BV Recent Developments/Updates
Table 189. Roartis BV Competitive Strengths & Weaknesses
Table 190. Everwide Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 191. Everwide Chemical Co., Ltd. Major Business
Table 192. Everwide Chemical Co., Ltd. PCB Underfill Encapsulants Product and Services
Table 193. Everwide Chemical Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 194. Everwide Chemical Co., Ltd. Recent Developments/Updates
Table 195. Everwide Chemical Co., Ltd. Competitive Strengths & Weaknesses
Table 196. Eternal Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 197. Eternal Materials Co., Ltd. Major Business
Table 198. Eternal Materials Co., Ltd. PCB Underfill Encapsulants Product and Services
Table 199. Eternal Materials Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 200. Eternal Materials Co., Ltd. Recent Developments/Updates
Table 201. Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
Table 202. Darbond Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 203. Darbond Technology Co., Ltd. Major Business
Table 204. Darbond Technology Co., Ltd. PCB Underfill Encapsulants Product and Services
Table 205. Darbond Technology Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 206. Darbond Technology Co., Ltd. Recent Developments/Updates
Table 207. Darbond Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 208. Hubei Huitian New Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 209. Hubei Huitian New Materials Co., Ltd. Major Business
Table 210. Hubei Huitian New Materials Co., Ltd. PCB Underfill Encapsulants Product and Services
Table 211. Hubei Huitian New Materials Co., Ltd. PCB Underfill Encapsulants Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Hubei Huitian New Materials Co., Ltd. Recent Developments/Updates

Table 213. Hubei Huitian New Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 214. Global Key Players of PCB Underfill Encapsulants Upstream (Raw Materials)

Table 215. Global PCB Underfill Encapsulants Typical Customers

Table 216. PCB Underfill Encapsulants Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. PCB Underfill Encapsulants Picture

Figure 2. World PCB Underfill Encapsulants Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World PCB Underfill Encapsulants Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World PCB Underfill Encapsulants Production (2021-2032) & (Tons)

Figure 5. World PCB Underfill Encapsulants Average Price (2021-2032) & (US\$/Ton)

Figure 6. World PCB Underfill Encapsulants Production Value Market Share by Region (2021-2032)

Figure 7. World PCB Underfill Encapsulants Production Market Share by Region (2021-2032)

Figure 8. North America PCB Underfill Encapsulants Production (2021-2032) & (Tons)

Figure 9. Europe PCB Underfill Encapsulants Production (2021-2032) & (Tons)

Figure 10. China PCB Underfill Encapsulants Production (2021-2032) & (Tons)

Figure 11. Japan PCB Underfill Encapsulants Production (2021-2032) & (Tons)

Figure 12. PCB Underfill Encapsulants Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 15. World PCB Underfill Encapsulants Consumption Market Share by Region (2021-2032)

Figure 16. United States PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 17. China PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 18. Europe PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 19. Japan PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 20. South Korea PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 21. ASEAN PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 22. India PCB Underfill Encapsulants Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of PCB Underfill Encapsulants by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for PCB Underfill Encapsulants Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for PCB Underfill Encapsulants Markets in 2025

Figure 26. United States VS China: PCB Underfill Encapsulants Production Value

Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: PCB Underfill Encapsulants Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: PCB Underfill Encapsulants Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers PCB Underfill Encapsulants Production Market Share 2025

Figure 30. China Based Manufacturers PCB Underfill Encapsulants Production Market Share 2025

Figure 31. Rest of World Based Manufacturers PCB Underfill Encapsulants Production Market Share 2025

Figure 32. World PCB Underfill Encapsulants Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World PCB Underfill Encapsulants Production Value Market Share by Type in 2025

Figure 34. Epoxy Based Underfill

Figure 35. Acrylic Based Underfill

Figure 36. Others

Figure 37. World PCB Underfill Encapsulants Production Market Share by Type (2021-2032)

Figure 38. World PCB Underfill Encapsulants Production Value Market Share by Type (2021-2032)

Figure 39. World PCB Underfill Encapsulants Average Price by Type (2021-2032) & (US\$/Ton)

Figure 40. World PCB Underfill Encapsulants Production Value by Package Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World PCB Underfill Encapsulants Production Value Market Share by Package Type in 2025

Figure 42. BGA and CSP Packages

Figure 43. WLCSP Packages

Figure 44. Flip Chip Packages

Figure 45. Others

Figure 46. World PCB Underfill Encapsulants Production Market Share by Package Type (2021-2032)

Figure 47. World PCB Underfill Encapsulants Production Value Market Share by Package Type (2021-2032)

Figure 48. World PCB Underfill Encapsulants Average Price by Package Type (2021-2032) & (US\$/Ton)

Figure 49. World PCB Underfill Encapsulants Production Value by Cure Mechanism,

(USD Million), 2021 & 2025 & 2032

Figure 50. World PCB Underfill Encapsulants Production Value Market Share by Cure Mechanism in 2025

Figure 51. Thermal Cure Underfill

Figure 52. Dual Cure Underfill

Figure 53. Ultraviolet Cure Underfill

Figure 54. Others

Figure 55. World PCB Underfill Encapsulants Production Market Share by Cure Mechanism (2021-2032)

Figure 56. World PCB Underfill Encapsulants Production Value Market Share by Cure Mechanism (2021-2032)

Figure 57. World PCB Underfill Encapsulants Average Price by Cure Mechanism (2021-2032) & (US\$/Ton)

Figure 58. World PCB Underfill Encapsulants Production Value by Underfill Process, (USD Million), 2021 & 2025 & 2032

Figure 59. World PCB Underfill Encapsulants Production Value Market Share by Underfill Process in 2025

Figure 60. Capillary Flow Full Underfill

Figure 61. Edge and Corner Bond Underfill

Figure 62. No Flow Underfill

Figure 63. Others

Figure 64. World PCB Underfill Encapsulants Production Market Share by Underfill Process (2021-2032)

Figure 65. World PCB Underfill Encapsulants Production Value Market Share by Underfill Process (2021-2032)

Figure 66. World PCB Underfill Encapsulants Average Price by Underfill Process (2021-2032) & (US\$/Ton)

Figure 67. World PCB Underfill Encapsulants Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 68. World PCB Underfill Encapsulants Production Value Market Share by Application in 2025

Figure 69. Consumer Electronics

Figure 70. Automotive Electronics

Figure 71. Computing and Communications

Figure 72. Others

Figure 73. World PCB Underfill Encapsulants Production Market Share by Application (2021-2032)

Figure 74. World PCB Underfill Encapsulants Production Value Market Share by Application (2021-2032)

Figure 75. World PCB Underfill Encapsulants Average Price by Application (2021-2032) & (US\$/Ton)

Figure 76. PCB Underfill Encapsulants Industry Chain

Figure 77. PCB Underfill Encapsulants Procurement Model

Figure 78. PCB Underfill Encapsulants Sales Model

Figure 79. PCB Underfill Encapsulants Sales Channels, Direct Sales, and Distribution

Figure 80. Methodology

Figure 81. Research Process and Data Source

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