

Global Semiconductor Package Substrates Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Semiconductor Package Substrates market size is expected to reach \$ 29757 million by 2032, rising at a market growth of 12.1% CAGR during the forecast period (2026-2032).

Semiconductor Package Substrates, also known as IC substrates, package substrates or IC carrier boards, are high-density organic baseboards that sit between bare semiconductor dies and the system PCB, forming a miniaturized 'bridge' that fans out the die's fine-pitch I/Os to the coarser pitch of the motherboard while providing mechanical support, thermal paths and electrical performance optimization.

Structurally, mainstream products include several families: Flip-Chip BGA (FCBGA) substrates, typically using ABF or high-performance BT laminates with 8-16 or more build-up layers, targeted at high-end CPUs, GPUs, FPGAs, ASICs and AI accelerators used in servers and networking equipment; FC-CSP/WLCSP/WBCSP chip-scale substrates, smaller and with fewer layers, widely adopted for mobile application processors, basebands, PMICs, RF transceivers and memory devices in smartphones and consumer products; wire-bond BGA (WB-BGA) substrates for cost-sensitive mid-performance devices such as MCUs, automotive logic and power management ICs; and SiP (System-in-Package) and RF-module substrates, which integrate multiple bare dies (logic/RF/memory/power) plus passives on the same organic substrate, sometimes including antennas to form AiP/AoP RF front-end modules for 5G phones, wearables, mmWave small cells and automotive radar. From a materials/platform view, IC substrates can be categorized into ABF-based, BT-based, hybrid organic/inorganic and emerging glass-core substrates, each with distinct trade-offs in routing density, dielectric performance, CTE, warpage control and cost: ABF FCBGA serves HPC/AI/server and high-end GPU markets, BT FCBGA/FC-CSP is dominant in smartphones and consumer

electronics, WLCSP/WBCSP enables ultra-miniaturized SoCs and analog devices, while SiP/RF module substrates underpin highly integrated RF front-ends and multi-chip modules across mobile and IoT.

From the perspective of product type and material structure, the global package substrate market is shifting from BT-based CSP/BGA and traditional module substrates toward high-end logic chip substrates represented by ABF/FC-BGA. By product form, package substrates mainly include FC-BGA substrates, FC-CSP substrates, WB-CSP/BGA substrates, and other module-type substrates. Among them, FC-BGA is the core substrate for server CPUs, GPUs, AI ASICs, HPC chips, network switch chips, and high-end processors; FC-CSP is mainly used in mobile application processors, baseband chips, PMICs, communication ICs, and mid-to-high-density consumer and mobile chips; WB-CSP/BGA and other substrates mainly serve memory, analog, RF, sensor, controller, and low-to-mid I/O chips. According to the data provided, the revenue share of FC-BGA increased from 33.67% in 2021 to 43.39% in 2025 and is expected to reach 53.06% in 2032, making it the largest product category in the industry. The share of FC-CSP is expected to decline from 22.62% in 2021 to 15.90% in 2032, while WB-CSP/BGA and others are expected to fall from 43.70% to 31.04%. By material, ABF substrate share is expected to increase from 33.67% in 2021 to 53.06% in 2032, while BT substrate share is expected to decline from 65.75% to 45.60%, and MIS substrate share is expected to rise from 0.57% to 1.35%. Ajinomoto describes ABF as a key build-up film for semiconductor packaging used in high-performance CPUs and other devices, supporting the formation of precision circuitry from the nanoscale to the millimeter scale. Samsung Electro-Mechanics also defines FCBGA as a high-density package substrate that connects highly integrated semiconductor chips to the mainboard, and notes that high-performance computing requires large body size and highly multilayered structures.

From the perspective of technical characteristics and application evolution, the technology roadmap of package substrates is developing around high-density interconnect, higher layer count, larger body size, lower loss, high-speed signals, low warpage, better heat dissipation, and system-level integration. ABF/FC-BGA has the highest technical barriers, involving ABF build-up layers, micro blind vias, fine line/space, interlayer alignment, low-Dk/Df materials, large-size warpage control, high-speed signal integrity, power integrity, and yield management. Its downstream applications are mainly AI GPUs, AI ASICs, server CPUs, HPC processors, 800G/1.6T network switch chips, and advanced logic chips. Samsung Electro-Mechanics has publicly showcased AI/server FCBGA with more than 20 layers, an area approximately six times that of ordinary FCBGA, and an internal layer count about twice that of

ordinary FCBGA for high-speed signal processing. This indicates that AI servers are significantly increasing the area, layer count, and value per package substrate. BT substrates emphasize mature processes, cost efficiency, high-volume yield, and broad application coverage, mainly serving memory, mobile terminals, RF, PMIC, SiP, BGA/CSP, and related applications. Although MIS substrates remain small in scale, they have differentiation potential in PMICs, analog ICs, power devices, RF/5G, sensors, QFN/LGA/BGA, and compact SiP packages, and are expected to increase penetration through advantages in coreless structures, thin profiles, and thermal management. By chip type, non-memory package substrates remain the absolute mainstream, with a revenue share of 87.87% in 2025 and an expected increase to 89.41% by 2032. Although the share of memory package substrates is expected to decline from 14.46% in 2021 to 10.59% in 2032, HBM, server DRAM, and enterprise SSDs will generate periodic high-end demand during the AI cycle.

From the perspective of industry policy and regional structure, package substrates have evolved from a traditional electronic circuit material into a critical component of advanced packaging and semiconductor supply chain security. The National Advanced Packaging Manufacturing Program under CHIPS for America has identified advanced substrates and materials research as a key focus area and has provided funding support for advanced substrate and materials projects, aiming to move advanced packaging technologies from validation toward domestic manufacturing capability in the United States. This policy direction is highly consistent with the regional restructuring of the global package substrate industry. Japan, South Korea, and Taiwan still control high-end ABF/FC-BGA capacity and core customer qualifications; Mainland China is accelerating its catch-up in BT substrates, CSP/BGA, module substrates, MIS, domestic FC-BGA, and high-end package substrates; Southeast Asian regions such as Malaysia, Singapore, Vietnam, and Thailand have become important destinations for incremental capacity and supply chain diversification due to the layouts of AT&S Kulim, TOPPAN Singapore, Samsung Vietnam, QDOS, and other players. The United States and Europe are unlikely to establish large-scale BT/ABF replacement capacity in the short term, but investment is rising in glass substrates, advanced packaging pilot lines, materials, equipment, and high-end packaging ecosystems. In the future, package substrate capacity deployment will no longer be determined only by cost and customer proximity, but will also be influenced by tariffs, country of origin, export controls, customer supply chain security reviews, and policy subsidies for advanced packaging.

From the perspective of competitive landscape, the global package substrate industry shows clear characteristics of leading-player concentration and segmentation-based differentiation. In the overall package substrate market, Unimicron, Samsung Electro-

Mechanics, Ibiden, Kinsus, Nan Ya PCB, Shinko Electric Industries, LG InnoTek, Simmtech, AT&S, and Daeduck Electronics remained the dominant suppliers in 2025. Among them, Unimicron, Samsung Electro-Mechanics, and Ibiden ranked as the top three, with overall revenue shares of 15.84%, 10.92%, and 10.88%, respectively. The ABF market is more concentrated. In 2025, Unimicron, Ibiden, AT&S, Shinko Electric Industries, Nan Ya PCB, Samsung Electro-Mechanics, and Kinsus accounted for the majority of the market, with competition centered on high layer count, large body size, AI/server customer qualification, and yield ramp-up. The FC-CSP market is characterized by tiered competition among Samsung Electro-Mechanics, Unimicron, Kyocera, LG InnoTek, Daeduck Electronics, Shennan Circuit, Zhen Ding Technology, and others, with applications more exposed to mobile, consumer, communication, and selected ASIC markets. The MIS market is highly concentrated, with MiSpak Technology, PPT, and QDOS together essentially covering the entire market in 2025. It is worth noting that Mainland Chinese suppliers are still in the catch-up stage in terms of overall market share, but companies such as Shennan Circuit, Shenzhen Fastprint, Zhuhai ACCESS Semiconductor, AKM Meadville, HOREXS, Hemei Precision, and MiSpak Technology are gradually increasing their presence in BT, MIS, CSP/BGA, module substrates, and domestic FC-BGA introduction. Future share gains will depend less on simple capacity expansion and more on customer qualification, stable yield, high-end material systems, equipment capability, funding strength, and co-development with domestic OSATs, IDMs, and fabless customers.

From the perspective of industry development status, trends, and growth drivers, the package substrate market has moved beyond the 2023 downcycle and entered a new structural growth phase led by AI/HPC and advanced packaging. The industry expansion in 2021?2022 was mainly driven by post-pandemic electronics demand, PCs and servers, memory, and tight supply. The 32.6% decline in 2023 reflected inventory correction in PCs, smartphones, consumer electronics, and memory, as well as the easing of ABF supply-demand tightness. The market recovered in 2024?2025, and growth is expected to reach 31.4% in 2026, mainly because AI server GPUs/ASICs, HBM, data centers, network switch chips, high-end logic, and memory are entering a strong demand cycle simultaneously. Looking toward 2032, industry growth will be driven by three major themes. First, the continued increase in FC-BGA/ABF share will push up overall ASP and industry value. Second, although BT substrates will lose share, they will remain the volume foundation for memory, mobile terminals, RF, PMIC, automotive electronics, and consumer electronics. Third, new technologies such as MIS, glass core, organic interposers, 2.5D/2.1D, chiplets, co-package substrates, and embedded passive/active components will expand the boundary of package substrate applications. Overall, growth in the package substrate industry from 2026 to 2032 will no

longer be driven mainly by traditional terminal shipment volume, but by the combined forces of AI computing expansion, increasing advanced packaging complexity, rising value content of high-end substrates, and regional supply chain security restructuring. Industry competition will also shift from simple capacity and pricing competition toward a comprehensive contest involving technology platforms, material systems, yield control, capital expenditure capability, major customer qualification, and global manufacturing footprint.

This report studies the global Semiconductor Package Substrates production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Package Substrates 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 Semiconductor Package Substrates that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Package Substrates total production and demand, 2021-2032, (K Sqm)

Global Semiconductor Package Substrates total production value, 2021-2032, (USD Million)

Global Semiconductor Package Substrates production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Semiconductor Package Substrates consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Semiconductor Package Substrates domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Package Substrates production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Semiconductor Package Substrates production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Semiconductor Package Substrates production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Semiconductor Package Substrates 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 Unimicron, Ibiden, Nan Ya PCB, Shinko Electric Industries, Kinsus Interconnect Technology, AT&S, Samsung Electro-Mechanics, Kyocera, Toppan, Zhen Ding Technology, 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 Semiconductor Package Substrates market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (USD/sqm) 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 Semiconductor Package Substrates Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Semiconductor Package Substrates Market, Segmentation by Type:

FCBGA Substrate

FCCSP Substrate

WB PBGA/CSP Substrate

Module Substrate

Global Semiconductor Package Substrates Market, Segmentation by Substrate Type:

ABF Substrate

BT Substrate

MIS Substrate

Global Semiconductor Package Substrates Market, Segmentation by IC Type:

Non-memory IC Substrate

Memory Substrate

Global Semiconductor Package Substrates Market, Segmentation by Application:

PCs

Servers & Data Centers

AI/HPC Accelerators

Communications & Networking

Smartphones & Mobile Devices

Wearables & Consumer Electronics

Automotive Electronics

Industrial, Medical, Aerospace & Others

Companies Profiled:

Unimicron

Ibiden

Nan Ya PCB

Shinko Electric Industries

Kinsus Interconnect Technology

AT&S

Samsung Electro-Mechanics

Kyocera

Toppan

Zhen Ding Technology

Daeduck Electronics

Zhuhai Access Semiconductor

LG InnoTek

Shennan Circuit

Shenzhen Fastprint Circuit Tech

Korea Circuit

FICT LIMITED

AKM Meadville

Shenzhen Hemei Jingyi Semiconductor Technology

Simmtech

HOREXS

ASE Material

PPt

MiSpak Technology

QDOS

Key Questions Answered:

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

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