

Global Thermally Conductive Epoxy Die Attach Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermally Conductive Epoxy Die Attach market size is expected to reach \$ 195 million by 2032, rising at a market growth of 6.6% CAGR during the forecast period (2026-2032).

Thermally conductive epoxy die attach adhesive is a functional bonding material used in the die attach step of semiconductor packaging. It uses epoxy resin as the matrix and incorporates silver, aluminum nitride, alumina, diamond, or composite ceramic fillers to improve heat transfer, forming a stable mechanical bond and a controlled thermal path between the die and the lead frame, ceramic substrate, PCB, package substrate, or heat dissipation structure. This material addresses issues such as junction temperature rise, excessive thermal resistance, thermal cycling failure, reduced damp-heat reliability, and bond-line voids in high-power-density devices, while enabling either electrically conductive and thermally conductive designs or electrically insulating and thermally conductive designs depending on package architecture. Common delivery forms include one-component heat-curing paste, two-component paste, premixed frozen adhesive, B-staged film, and materials designed for dispensing, pin transfer, screen printing, or wafer backside coating. Typical applications include power semiconductors, automotive power devices, LED and laser diodes, RF and microwave devices, optoelectronic devices, hybrid integrated circuits, and high-performance computing chip packaging. Key competitive factors include thermal conductivity, volume resistivity, ionic contamination, curing window, rheological stability, bond line thickness control, die shear strength, moisture absorption, and long-term thermal cycling reliability.

Thermally conductive epoxy die attach adhesive is at a critical stage in which semiconductor packaging materials are evolving from general-purpose bonding materials into functional thermal management materials. As chip operating power,

packaging density, and heat generation per unit area continue to rise, the die attach layer is no longer merely a bonding medium that supports the chip. It has become a core interface that determines junction temperature, thermal resistance, warpage, interfacial stress, and long-term reliability. Epoxy systems provide strong adhesion, formulation flexibility, damp-heat resistance, and process compatibility. By incorporating silver, aluminum nitride, alumina, diamond, and composite ceramic fillers, suppliers can achieve different levels of thermal conductivity and select either electrically conductive and thermally conductive designs or electrically insulating and thermally conductive designs depending on the device's electrical architecture. As packaging requirements rise for power semiconductors, automotive electronics, LEDs, laser diodes, RF devices, and high-performance computing chips, customer evaluation criteria are expanding beyond viscosity, curing time, and bond strength to include thermal conductivity, volume resistivity, bond line thickness, low voiding, low ionics, moisture absorption, thermal cycling life, and automated dispensing stability. This shift will continue to raise the technical threshold for high-end thermally conductive epoxy die attach adhesives and encourage suppliers to pursue deeper formulation customization around package structures, die sizes, and heat dissipation paths.

From the supply perspective, the market features parallel development by international leaders and regional substitution suppliers. European, American, and Japanese suppliers have accumulated long-standing expertise in high-reliability microelectronic packaging materials and generally offer more complete portfolios, reliability databases, and cross-regional customer qualification capabilities. Their product coverage includes conductive die attach adhesives, electrically insulating thermal adhesives, B-staged films, premixed frozen adhesives, wafer backside coating materials, and high-thermal-conductivity specialty materials. At the same time, suppliers in mainland China, Taiwan, and South Korea are accelerating adoption with local semiconductor assembly and test, LED, power module, and electronics manufacturing customers. Their advantages lie in service responsiveness, cost control, application validation support, and supply chain security. Because these materials typically require formulation screening, dispensing process window confirmation, curing profile matching, die shear testing, damp-heat reliability evaluation, thermal cycling, and end-customer qualification before volume production, competition is not driven by price alone. It is a combined contest of material performance, batch stability, process support capability, and customer qualification cycle. High-end applications are expected to remain led by companies with extensive application data and global customer resources, while mid-range and regional scenarios will continue to create substitution opportunities for local suppliers.

The long-term demand trend is clear. Semiconductor packaging is expanding from

traditional consumer electronics into new energy vehicles, industrial control, energy conversion, AI servers, data centers, communication infrastructure, and high-reliability optoelectronic devices. This expansion is transforming die attach materials from ordinary bonding consumables into part of the package thermal path and reliability design. Power devices place particularly high requirements on thermal interfaces. SiC, GaN, IGBT, MOSFET, laser diode, and high-brightness LED devices face higher heat flux density and more severe thermal cycling, requiring thermally conductive epoxy die attach adhesives to balance thermal conductivity, low stress, low moisture absorption, and manufacturability. At the same time, packaging capacity is highly concentrated in Asia Pacific, where the regional manufacturing ecosystem is complete and customer validation and volume ramp-up can proceed quickly. This will continue to support demand in China, Japan, South Korea, Taiwan, and Southeast Asia. As automotive electronics and industrial power electronics impose stricter long-term reliability requirements, material suppliers will further enhance product value through high-thermal-conductivity filler hybridization, resin toughening, low-temperature rapid curing, low-ionic control, and automated dispensing compatibility.

This report studies the global Thermally Conductive Epoxy Die Attach production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Thermally Conductive Epoxy Die Attach 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 Thermally Conductive Epoxy Die Attach that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Thermally Conductive Epoxy Die Attach total production and demand, 2021-2032, (Kilogram)

Global Thermally Conductive Epoxy Die Attach total production value, 2021-2032, (USD Million)

Global Thermally Conductive Epoxy Die Attach production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilogram), (based on production site)

Global Thermally Conductive Epoxy Die Attach consumption by region & country, CAGR, 2021-2032 & (Kilogram)

U.S. VS China: Thermally Conductive Epoxy Die Attach domestic production, consumption, key domestic manufacturers and share

Global Thermally Conductive Epoxy Die Attach production by manufacturer, production,

price, value and market share 2021-2026, (USD Million) & (Kilogram)

Global Thermally Conductive Epoxy Die Attach production by Thermally Conductive Filler System, production, value, CAGR, 2021-2032, (USD Million) & (Kilogram)

Global Thermally Conductive Epoxy Die Attach production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilogram)

This report profiles key players in the global Thermally Conductive Epoxy Die Attach 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, Meridian Adhesives Group, Master Bond Inc., DELO Industrial Adhesives, Dr. H?nle AG, Polytec PT GmbH Polymere Technologien, Nan Pao Resins Chemical Co., Ltd., Darbond Technology Co., Ltd., KCC 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 Thermally Conductive Epoxy Die Attach market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilogram) and average price (US\$/Kg) by manufacturer, by Thermally Conductive Filler System, 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 Thermally Conductive Epoxy Die Attach Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermally Conductive Epoxy Die Attach Market, Segmentation by Thermally Conductive Filler System:

Silver-Filled Thermally Conductive Epoxy Die Attach Adhesive

Aluminum Nitride-Filled Thermally Conductive Epoxy Die Attach Adhesive

Alumina-Filled Thermally Conductive Epoxy Die Attach Adhesive

Diamond-Filled Thermally Conductive Epoxy Die Attach Adhesive

Composite Ceramic-Filled Thermally Conductive Epoxy Die Attach Adhesive

Global Thermally Conductive Epoxy Die Attach Market, Segmentation by Delivery Form:

Dispensing Paste Thermally Conductive Epoxy Die Attach Adhesive

Screen Printing Paste Thermally Conductive Epoxy Die Attach Adhesive

Premixed Frozen Thermally Conductive Epoxy Die Attach Adhesive

B-Stage Film Thermally Conductive Epoxy Die Attach Adhesive

Global Thermally Conductive Epoxy Die Attach Market, Segmentation by Curing Process:

Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Fast Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Low-Temperature Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Other

Global Thermally Conductive Epoxy Die Attach Market, Segmentation by Die Attach Process:

Dispensing-Applied Thermally Conductive Epoxy Die Attach Adhesive

Pin-Transfer-Applied Thermally Conductive Epoxy Die Attach Adhesive

Screen-Printing-Applied Thermally Conductive Epoxy Die Attach Adhesive

Wafer-Backside-Coated Thermally Conductive Epoxy Die Attach Adhesive

Global Thermally Conductive Epoxy Die Attach Market, Segmentation by Application:

Power Semiconductor Packaging

Automotive Power Device Packaging

LED and Laser Diode Packaging

Optoelectronic Device Packaging

High-Performance Computing Chip Packaging

Companies Profiled:

Henkel AG & Co. KGaA

NAMICS Corporation

Meridian Adhesives Group

Master Bond Inc.

DELO Industrial Adhesives

Dr. H?nle AG

Polytec PT GmbH Polymere Technologien

Nan Pao Resins Chemical Co., Ltd.

Darbond Technology Co., Ltd.

KCC Corporation

Tanaka Precious Metals

Qnity Electronics

AI Technology, Inc.

Creative Materials Inc.

Vitrochem Technology

LIPOLY

Key Questions Answered:

1. How big is the global Thermally Conductive Epoxy Die Attach market?
2. What is the demand of the global Thermally Conductive Epoxy Die Attach market?
3. What is the year over year growth of the global Thermally Conductive Epoxy Die Attach market?
4. What is the production and production value of the global Thermally Conductive Epoxy Die Attach market?
5. Who are the key producers in the global Thermally Conductive Epoxy Die Attach market?
6. What are the growth factors driving the market demand?

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