

Global Underfill Epoxies Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

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Abstracts

According to our (Global Info Research) latest study, the global Underfill Epoxies market size was valued at US\$ 301 million in 2024 and is forecast to a readjusted size of USD 408 million by 2031 with a CAGR of 4.2% during review period.

In this report, we will assess the current U.S. tariff framework alongside international policy adaptations, analyzing their effects on competitive market structures, regional economic dynamics, and supply chain resilience.

Underfill epoxies are high-performance adhesive materials used in semiconductor packaging to fill the narrow gap between microchips (such as flip chips or ball grid arrays) and their substrates or printed circuit boards. Designed to enhance the mechanical strength and thermal stability of solder joints, underfill epoxies mitigate stress caused by differences in thermal expansion between components during temperature cycling. These materials are typically dispensed in liquid form to flow under the chip by capillary action and then cured to form a rigid, protective layer. Key characteristics include low viscosity, high adhesion, low coefficient of thermal expansion (CTE), and resistance to moisture, vibration, and thermal fatigue, making them essential for ensuring long-term reliability in electronic assemblies.

Underfill epoxies are characterized by several key performance parameters that determine their suitability for specific microelectronic applications. Typical viscosity ranges from 50 to 5,000 cP, enabling effective capillary flow under components. They cure at temperatures between 120°C and 180°C, with cure times from 30 seconds to 30 minutes depending on the formulation. A high glass transition temperature (T_g) of 100°C to 180°C ensures thermal stability, while a low coefficient of thermal expansion

(CTE), typically 20 to 70 ppm/°C, minimizes stress between materials. Thermal conductivity varies from 0.2 to 2.0 W/m-K for standard and thermally conductive grades. Moisture absorption is kept low, usually below 0.5%, to enhance reliability in humid environments. High adhesion strength (often exceeding 30 MPa) and tailored filler content (20%–80% by weight) contribute to mechanical robustness, and some variants offer reworkability for repairable systems.

This report is a detailed and comprehensive analysis for global Underfill Epoxies 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 Underfill Epoxies market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Underfill Epoxies market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Underfill Epoxies market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2020-2031

Global Underfill Epoxies market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2020-2025

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 Underfill Epoxies

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 Underfill Epoxies 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, H.B. Fuller, Nagase ChemteX, NAMICS, Dexerials, Shin-Etsu, Panacol-Elosol, Dow, 3M Company, Zymet, etc.

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

Market Segmentation

Underfill Epoxies market is split by Type and by Application. For the period 2020-2031, 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

Capillary Flow Underfill (CUF)

No-Flow Underfill (NUF)

Molded Underfill (MUF)

Others

Market segment by Application

Semiconductor

Consumer Electronics

Automotive

Medical Devices

Industrial

Others

Major players covered

Henkel

H.B. Fuller

Nagase ChemteX

NAMICS

Dexerials

Shin-Etsu

Panacol-Elosol

Dow

3M Company

Zymet

Master Bond

Parker Hannifin

Hitachi Chemical

EPOXY Technology

Kaken Tech

Sanyu Rec

Permabond

MG Chemicals

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

Chapter 2, to profile the top manufacturers of Underfill Epoxies, with price, sales quantity, revenue, and global market share of Underfill Epoxies from 2020 to 2025.

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

Chapter 4, the Underfill Epoxies breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2020 to 2031.

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 2020 to 2031.

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 2020 to 2025. and Underfill Epoxies market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

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 Underfill Epoxies.

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

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