

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

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Abstracts

The global Underfill market size is expected to reach \$ 1550 million by 2032, rising at a market growth of 9.8% CAGR during the forecast period (2026-2032).

Underfill materials are a type of specialized material used in the field of electronic packaging, primarily designed to fill the gaps between integrated circuits (ICs) and printed circuit boards (PCBs) to enhance the reliability and durability of electronic components. Underfill materials are typically made from high-performance substances such as epoxy resins, cyanate esters, and silicone resins, which possess excellent fluidity, thermal stability, mechanical shock resistance, and low coefficient of expansion. These materials effectively reduce thermal stress caused by thermal cycling, ensuring that the packaged structure remains stable and durable during use. They are mainly used in semiconductor packaging, especially in packaging types such as Ball Grid Array (BGA) and Chip-on-Substrate (CSP).

The variety of underfill materials is broad, with different formulations tailored to specific application requirements. For example, fast-curing underfill materials are suitable for high-efficiency production environments, while materials with low expansion coefficients are ideal for applications requiring high thermal stability. In addition, as electronic products continue to demand higher performance, new types of underfill materials have emerged, including those with better thermal conductivity, moisture resistance, and enhanced adhesion properties. The application range of these materials is not limited to traditional consumer electronics but is gradually expanding to fields such as automotive electronics, medical electronics, and aerospace. Driven by emerging technologies like 5G and the Internet of Things (IoT), the demand for underfill materials is increasing, further boosting market growth.

According to market research, the global output of Underfill in 2024 was estimated to be approximately 250–300 tons. Prices vary significantly depending on product specifications, with an overall price range of \$2,500–3,000 per kilogram.

The underfill material market has experienced steady growth over the past few years, driven by several factors. First, the performance requirements of electronic products have been increasingly demanding, particularly with the growing density of integrated circuit packaging, which has raised the standards for underfill materials. Additionally, the widespread adoption of 5G, the Internet of Things (IoT), and smart devices has positively impacted market demand. These emerging technologies require smaller, more efficient, and reliable electronic components, leading to the broader application of underfill materials in new scenarios.

The main risks facing the market include fluctuations in raw material prices, instability in the supply chain, and increasingly stringent environmental regulations. The production process of some underfill materials can have certain environmental impacts, and changes in environmental regulations may exert pressure on the market. Furthermore, the technology barriers for underfill materials are high, requiring continuous innovation to meet more complex and diversified needs. This means that leading companies in the market, with their technological advantages and innovation capabilities, have captured a significant market share, resulting in a relatively concentrated market structure.

In terms of downstream demand, the demand from consumer electronics, automotive electronics, and industrial electronics continues to grow, particularly in the fields of smartphones, automotive electronics, and medical devices, where the demand for underfill materials is on the rise. As intelligent and high-performance electronic products become more widespread, the demand for high-performance and highly reliable underfill materials has become stronger.

In terms of the latest technologies, thermally conductive underfill materials, low expansion coefficient materials, and environmentally friendly materials are becoming mainstream trends in the market. Thermally conductive materials can significantly improve the heat dissipation performance of packaging, especially in high-power electronic components. Low expansion coefficient materials are suitable for applications in environments with high temperature variations. Environmentally friendly underfill materials, with their low environmental impact and compliance with stringent environmental standards, are increasingly favored by customers.

This report studies the global Underfill production, demand, key manufacturers, and key

regions.

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

Highlights and key features of the study

Global Underfill total production and demand, 2021-2032, (MT)

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

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

Global Underfill consumption by region & country, CAGR, 2021-2032 & (MT)

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

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

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

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

This report profiles key players in the global Underfill 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, NAMICS Corporation, Panasonic Lexcm, Resonac (Showa Denko), Hanstars, Shin-Etsu Chemical, MacDermid Alpha, ThreeBond, Parker LORD, Nagase ChemteX, 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 Underfill market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (MT) and average price (US\$/Kg) 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 Underfill Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underfill Market, Segmentation by Type:

Wafer and Panel-Level Underfill

Board-Level Underfill

Global Underfill Market, Segmentation by Flowability:

CUF

NCF

Global Underfill Market, Segmentation by Material Type:

Epoxy-based Underfill

Polyurethane-based Underfill

Silicone-based Underfill

Global Underfill Market, Segmentation by Curing Method:

Thermal Cured Underfill

UV Cured Underfill

Global Underfill Market, Segmentation by Application:

Industrial Electronics

Consumer Electronics

Automotive Electronics

Others

Companies Profiled:

Henkel

NAMICS Corporation

Panasonic Lexcm

Resonac (Showa Denko)

Hanstars

Shin-Etsu Chemical

MacDermid Alpha

ThreeBond

Parker LORD

Nagase ChemteX

Bondline

AIM Solder

Zymet

Panacol-Elosol GmbH

Dover

Darbond Technology

Yantai Hightite Chemicals

Sunstar

DeepMaterial

SINY

GTA Material

H.B.Fuller

Fuji Chemical

United Adhesives

Asec Co.,Ltd.

Key Questions Answered:

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

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