

Global Underfill Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Underfill market size was valued at US\$ 813 million in 2025 and is forecast to a readjusted size of US\$ 1550 million by 2032 with a CAGR of 9.8% during review period.

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 is a detailed and comprehensive analysis for global Underfill 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 market size and forecasts, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Underfill market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Underfill market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MT), and average selling prices (US\$/Kg), 2021-2032

Global Underfill market shares of main players, shipments in revenue (\$ Million), sales quantity (MT), and ASP (US\$/Kg), 2021-2026

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

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 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, 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.

Market Segmentation

Underfill market is split by Type and by Application. For the period 2021-2032, 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

Wafer and Panel-Level Underfill

Board-Level Underfill

Market segment by Flowability

CUF

NCF

Market segment by Material Type

Epoxy-based Underfill

Polyurethane-based Underfill

Silicone-based Underfill

Market segment by Curing Method

Thermal Cured Underfill

UV Cured Underfill

Market segment by Application

Industrial Electronics

Consumer Electronics

Automotive Electronics

Others

Major players covered

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.

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

Chapter 2, to profile the top manufacturers of Underfill, with price, sales quantity, revenue, and global market share of Underfill from 2021 to 2026.

Chapter 3, the Underfill competitive situation, sales quantity, revenue, and global market

share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Underfill breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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 2021 to 2032.

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 2021 to 2026. and Underfill market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

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.

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

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