

# Global Warpage Control Materials for Advanced Packaging 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 Warpage Control Materials for Advanced Packaging market size was valued at US\$ 1592 million in 2025 and is forecast to a readjusted size of US\$ 2353 million by 2032 with a CAGR of 4.6% during review period.

Warpage control materials for advanced packaging are functional packaging materials used in fan-out wafer-level packaging, panel-level packaging, flip-chip packaging, 2.5D and 3D heterogeneous integration, power modules, and high-density module packaging. Their core purpose is to suppress package warpage, die shift, cracking, delamination, voiding, and interconnect fatigue during wafer thinning, reconstitution molding, chip interconnection, molding curing, redistribution, and board-level assembly through the coordinated design of coefficient of thermal expansion, glass transition temperature, elastic modulus, curing shrinkage, filler particle size, flowability, adhesion strength, and clean debonding performance. These materials typically include low-warpage epoxy molding compounds, liquid molding compounds, molded underfills, capillary underfills, sheet encapsulation films, temporary bonding and debonding adhesives, low-thermal-expansion substrate-related resin materials, and board-level reinforcement adhesives. They can serve as packaging protection and structural support materials, as well as temporary support materials for thin-wafer handling and heterogeneous integration. Typical customers include OSATs, advanced packaging divisions of wafer fabs, IDMs, power module manufacturers, substrate manufacturers, and electronic materials integrators.

The strategic value of warpage control materials for advanced packaging is shifting from single-purpose auxiliary materials to a core variable of package structural reliability. As

die size increases, package thickness declines, the number of heterogeneous chips grows, and redistribution structures become more complex, thermomechanical stress rises significantly during high-temperature curing, cooling, wafer thinning, carrier release, and board-level assembly. Conventional packaging materials mainly need to provide insulation, moisture resistance, and mechanical protection, while advanced packaging materials must balance low thermal expansion, low shrinkage, high flowability, low modulus, strong adhesion, high heat resistance, and low ionic contamination. The competitiveness of materials suppliers no longer depends only on resin and filler formulation, but also on systematic understanding of package structure, die size, molding method, curing profile, carrier release, and reliability qualification. Future high-end product value will increasingly come from process co-development capability and customer qualification barriers. Suppliers that can provide integrated materials portfolios for FOWLP, FOPLP, flip-chip, 2.5D, and 3D stacking will be better positioned to enter long-term core customer platforms.

On the demand side, AI chips, high-bandwidth memory, Chiplet architectures, automotive-grade power devices, high-frequency communication modules, and high-density SiP are jointly increasing the application intensity of warpage control materials. Advanced packaging is not only an upgrade of chip interconnection methods, but also a simultaneous increase in package area, material layers, heat-source distribution, and interface count. Any minor warpage, voiding, cracking, or interface mismatch may be amplified into yield and reliability issues. Therefore, low-warpage EMC, liquid molding compounds, molded underfills, capillary underfills, sheet encapsulation films, and temporary bonding materials will form combined applications across different process steps. FOWLP and FOPLP place greater emphasis on uniform large-area molding of reconstituted wafers or panels. Flip-chip and high-performance computing packages focus more on fine-pitch interconnect protection. Power modules emphasize high thermal conductivity, high heat resistance, and thermal cycling reliability. As advanced packaging capacity expands and customer qualification standards rise, demand for these materials will become more customized, serialized, and high-end.

On the supply side, warpage control materials for advanced packaging show clear regional clustering and technical stratification. Japanese companies have deep experience in epoxy molding compounds, underfills, sheet encapsulation materials, and temporary bonding materials. Korean companies have scalable supply capabilities in semiconductor packaging EMC and electronic materials systems. U.S. and German companies have strengths in underfills, temporary support materials, UV-curable encapsulation adhesives, and high-reliability electronic adhesives. Suppliers in mainland China and Taiwan are accelerating substitution in epoxy molding compounds,

liquid molding compounds, and advanced packaging support materials. Entry barriers in this industry come not only from formulation development, but also from particle-size control, metal-ion control, volatile control, batch consistency, joint qualification with packaging customers, and long-term reliability databases. Future competition will follow two main paths: international suppliers maintaining advantages through high-end products and customer lock-in, and local suppliers gradually expanding share under packaging capacity migration and supply-chain security demand.

This report is a detailed and comprehensive analysis for global Warpage Control Materials for Advanced Packaging market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Material Form 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 Warpage Control Materials for Advanced Packaging market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Warpage Control Materials for Advanced Packaging market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Warpage Control Materials for Advanced Packaging market size and forecasts, by Material Form and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Warpage Control Materials for Advanced Packaging market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Warpage Control Materials for Advanced Packaging

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 Warpage Control Materials for Advanced Packaging 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 Resonac Corporation, Sumitomo Bakelite Co., Ltd., Shin-Etsu Chemical Co., Ltd., Panasonic Industry Co., Ltd., KYOCERA Corporation, NAMICS Corporation, Nagase ChemteX Corporation, Toray Industries, Inc., Tokyo Ohka Kogyo Co., Ltd., Nitto Denko Corporation, etc.

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

## Market Segmentation

Warpage Control Materials for Advanced Packaging market is split by Material Form and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Material Form, 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 Material Form

Solid

Liquid

Sheet

Tape

Paste

## Market segment by Resin System

Epoxy Resin

Polyimide

Acrylic Resin

Silicone Resin

Composite Resin

## Market segment by Packaging Process

Transfer Molding

Compression Molding

Liquid Compression Molding

Others

## Market segment by Application

Wafer Thinning Support

Wafer Reconstitution Packaging

Chip Interconnect Reinforcement

Others

## Major players covered

Resonac Corporation

Sumitomo Bakelite Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

Panasonic Industry Co., Ltd.

KYOCERA Corporation

NAMICS Corporation

Nagase ChemteX Corporation

Toray Industries, Inc.

Tokyo Ohka Kogyo Co., Ltd.

Nitto Denko Corporation

Furukawa Electric Co., Ltd.

Samsung SDI Co., Ltd.

KCC Corporation

Jiangsu HHCK Advanced Materials Co., Ltd.

SCIENCHEM

Chang Chun Group

Eternal Materials Co., Ltd.

Henkel AG & Co. KGaA

DELO Industrial Adhesives GmbH & Co. KGaA

Brewer Science, Inc.

3M Company

MacDermid Alpha Electronics Solutions

Master Bond Inc.

Epoxy Technology, Inc.

H.B. Fuller Company

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 Warpage Control Materials for Advanced Packaging product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Warpage Control Materials for Advanced Packaging, with price, sales quantity, revenue, and global market share of Warpage Control Materials for Advanced Packaging from 2021 to 2026.

Chapter 3, the Warpage Control Materials for Advanced Packaging competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Warpage Control Materials for Advanced Packaging 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 Material Form and by Application, with sales market share and growth rate by Material Form, 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 Warpage Control Materials for Advanced Packaging market forecast, by regions, by Material Form, 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 Warpage Control Materials for Advanced Packaging.

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