

# **Global Advanced Packaging Market By Type (Flip-Chip Ball Grid Array, Flip Chip CSP, Wafer Level CSP, 2),5D/3D and others), By End User (Consumer Electronics, Automotive, Industrial, Aerospace & Defense, Healthcare & Life Sciences and Others), By Region, Industry Analysis and Forecast, 2020 - 2026**

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## **Abstracts**

The Global Advanced Packaging Market size is expected to reach \$55.8 billion by 2026, rising at a market growth of 12.7% CAGR during the forecast period. The increasing need for advanced wafer packaging techniques for fast-growing IoT and next-generation mobile chipsets is influencing the advanced packaging market. Growing demands for high-performance gadgets in developing economies have kept the market progressively lucrative over the years. Increasing the adoption of AI in industrial automation will increase the demand for high-end chips manufactured using advanced packaging. In the advanced packaging market, lithography manufacturing processes have accumulated steam. Furthermore, heterogeneous integration techniques are being used to gather steam between packaging service providers.

Advanced packaging has opened up a new paradigm of chip making and changed semiconductor processing processes. Foundries have increasingly benefited from the automation of advanced packaging processes, particularly underpinned by the increasing initiatives of electronic design automation. Efforts are being made to ensure that modern packaging satisfies the various conditions of power dissipation, field operation and, most notably, costs.

The growth of the specialized packaging industry also derives from the need for high-performance chips for a wide variety of consumer electronics. This has increased demand for 3D and 2.5D packaging in chips that are used in smartphones and several other mobile devices. In addition, developments in panel-level fan-out technology have

also opened up new opportunities in the advanced packaging market. With the recent outbreak of COVID 19, the advanced packaging industry will see a reduction in growth owing to restrictions on the movement of goods and significant deterioration of the semiconductor supply chain. In addition, large-scale semiconductor vendors are operating with reduced capability due to the spread of the COVID-19 virus around the world.

Based on Type, the market is segmented into Flip-Chip Ball Grid Array, Flip Chip CSP, Wafer Level CSP, 2.5D/3D and others. Based on End User, the market is segmented into Consumer Electronics, Automotive, Industrial, Aerospace & Defense, Healthcare & Life Sciences and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

Based on the Analysis presented in the Cardinal matrix, Samsung Electronics Co., Ltd., Intel Corporation, IBM Corporation, Texas Instruments, Inc., and Qualcomm, Inc. are the forerunners in the Advanced Packaging Market. Companies such as Renesas Electronics Corporation, Amkor Technology, Inc., and Brewer Science, Inc., Microchip Technology, Inc., and Analog Devices, Inc. are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Qualcomm, Inc., Intel Corporation, IBM Corporation, Texas Instruments, Inc., Analog Devices, Inc., Renesas Electronics Corporation, Samsung Electronics Co., Ltd. (Samsung Group), Amkor Technology, Inc., Brewer Science, Inc., and MICROCHIP Technology, Inc.

Recent strategies deployed in Advanced Packaging Market  
Partnerships, Collaborations, and Agreements:

Dec-2019: Samsung Electronics collaborated with Baidu, a leading Chinese-language Internet search provider. Following the collaboration, Baidu's first cloud-to-edge AI accelerator, Baidu KUNLUN, has completed its development. Baidu KUNLUN chip is built on the company's advanced XPU, a home-grown neural processor architecture for cloud, edge, and AI, as well as Samsung's 14-nanometer (nm) process technology with its I-Cube (Interposer-Cube) package solution.

Oct-2019: IBM Japan, Ltd. announced its collaboration with Panasonic Smart Factory Solutions Co., Ltd. Following the collaboration, the companies were aimed to develop and market a new high-value-added system to optimize the overall equipment effectiveness (OEE) of customers' semiconductor manufacturing processes.

Jun-2019: Intel Custom Foundry teamed up with The University of Southern California's Viterbi Information Sciences Institute (ISI). The collaboration was formed on designing,

fabricating, and packaging integrated circuits through its MOSIS unit. The collaboration integrated MOSIS's industry-leading integrated circuit manufacturing expertise with Intel's high-performance complementary metal-oxide-semiconductor (CMOS) fabrication and packaging technology.

#### Acquisition and Mergers:

Sep-2018: Renesas took over Integrated Device Technology (IDT), a company that develops complete mixed-signal, system-level semiconductor solutions. The acquisition strengthened its presence in the industrial and automotive segments.

May-2017: Amkor Technology acquired NANIUM S.A., a world-class provider of wafer-level fan-out (WLFO) semiconductor packaging solutions. The acquisition strengthened Amkor's position in the fast-growing market of wafer-level packaging for smartphones, tablets, and other applications.

Feb-2017: Renesas Electronics announced the acquisition of Intersil Corporation, a leading provider of innovative power management and precision analog solutions. The acquisition combined the advanced technology and deep end-market expertise of the two companies and reinforced Renesas' position as a leading global supplier delivering advanced embedded systems to customers.

Jan-2016: Amkor Technology completed the acquisition of J-Devices, the largest OSAT in Japan, and the sixth-largest in the world. The acquisition reinforced Amkor's position as the world's second-largest OSAT.

#### Product Launches and Product Expansions:

May-2020: Renesas Electronics introduced RA4W1 MCU, the first RA microcontroller (MCU) with an integrated Bluetooth 5.0 Low Energy radio. The single-chip RA4W1 MCU includes a 48 MHz, 32-bit Arm Cortex-M4 core, and Bluetooth 5.0 core delivered in a 56-pin QFN package. Together, the RA4W1 MCU and easy-to-use Flexible Software Package (FSP) enabled engineers to immediately begin development with Arm ecosystem software and hardware building blocks that work out-of-the-box with RA MCUs.

Jan-2020: Brewer Science unveiled its first material for permanent bonding. This new material is included within the Brewer Science product family of PermaSOL materials. The new material would address a range of needs identified for permanent bonding applications, which include low-temperature bonding, extreme chemical resistance, UV or thermal curable bonding process, and no material movement after cure.

Oct-2019: Renesas Electronics released Renesas Advanced (RA) Family of 32-bit Arm Cortex-M microcontrollers (MCUs). RA MCUs provide the ultimate combination of optimized performance, security, connectivity, peripheral IP, and easy-to-use Flexible Software Package (FSP) for addressing the next generation of embedded solutions.

Jul-2019: Intel launched three new packaging technologies named as Co-EMIB, Omni-Directional Interconnect (ODI), and Multi-Die I/O (MDIO). These technologies are built

upon Intel's 2.5D EMIB and 3D Foveros tech and would bring near-monolithic power and performance to heterogeneous packages.

## Scope of the Study

### Market Segmentation:

#### By Type

Flip-Chip Ball Grid Array

Flip Chip CSP

Wafer Level CSP

2.5D/3D

Others

#### By End User

Consumer Electronics

Automotive

Industrial

Aerospace & Defense

Healthcare & Life Sciences

Others

#### By Geography

North America

US

Canada

Mexico

Rest of North America

Europe

Germany

UK

France

Russia

Spain

Italy

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Singapore

Malaysia

Rest of Asia Pacific

## LAMEA

Brazil

Argentina

UAE

Saudi Arabia

South Africa

Nigeria

Rest of LAMEA

## Companies Profiled

Qualcomm, Inc.

Intel Corporation

IBM Corporation

Texas Instruments, Inc.

Analog Devices, Inc.

Renesas Electronics Corporation

Samsung Electronics Co., Ltd. (Samsung Group)

Amkor Technology, Inc.

Brewer Science, Inc.

Microchip Technology, Inc.

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## Contents

### CHAPTER 1. MARKET SCOPE & METHODOLOGY

- 1.1 Market Definition
- 1.2 Objectives
- 1.3 Market Scope
- 1.4 Segmentation
  - 1.4.1 Global Advanced Packaging Market, by Type
  - 1.4.2 Global Advanced Packaging Market, by End User
  - 1.4.3 Global Advanced Packaging Market, by Geography
- 1.5 Methodology for the research

### CHAPTER 2. MARKET OVERVIEW

- 2.1 Introduction
  - 2.1.1 Overview
  - 2.1.2 Executive Summary
  - 2.1.3 Market Composition and Scenario
- 2.2 Key Factors Impacting the Market
  - 2.2.1 Market Drivers
  - 2.2.2 Market Restraints

### CHAPTER 3. COMPETITION ANALYSIS - GLOBAL

- 3.1 KBV Cardinal Matrix
- 3.2 Recent Industry Wide Strategic Developments
  - 3.2.1 Partnerships, Collaborations and Agreements
  - 3.2.2 Product Launches and Product Expansions
  - 3.2.3 Geographical Expansions
  - 3.2.4 Mergers & Acquisitions
- 3.3 Top Winning Strategies
  - 3.3.1 Key Leading Strategies: Percentage Distribution (2016-2020)
  - 3.3.2 Key Strategic Move: (Partnerships, Collaborations, and Agreements : 2016, Jan – 2019,Dec) Leading Players

### CHAPTER 4. GLOBAL ADVANCED PACKAGING MARKET BY TYPE

- 4.1 Global Advanced Packaging Flip-Chip Ball Grid Array Market by Region

*Global Advanced Packaging Market By Type (Flip-Chip Ball Grid Array, Flip Chip CSP, Wafer Level CSP, 2),5D/3D...*



- 4.2 Global Advanced Packaging Flip Chip CSP Market by Region
- 4.3 Global Advanced Packaging Wafer Level CSP Market by Region
- 4.4 Global Advanced Packaging 2.5D/3D Market by Region
- 4.5 Global Other Type Advanced Packaging Market by Region

## **CHAPTER 5. GLOBAL ADVANCED PACKAGING MARKET BY END USER**

- 5.1 Global Consumer Electronics Advanced Packaging Market by Region
- 5.2 Global Automotive Advanced Packaging Market by Region
- 5.3 Global Industrial Advanced Packaging Market by Region
- 5.4 Global Aerospace & Defense Advanced Packaging Market by Region
- 5.5 Global Healthcare & Life Sciences Advanced Packaging Market by Region
- 5.6 Global Others Advanced Packaging Market by Region

## **CHAPTER 6. GLOBAL ADVANCED PACKAGING MARKET BY REGION**

- 6.1 North America Advanced Packaging Market
  - 6.1.1 North America Advanced Packaging Market by Type
    - 6.1.1.1 North America Advanced Packaging Flip-Chip Ball Grid Array Market by Country
    - 6.1.1.2 North America Advanced Packaging Flip Chip CSP Market by Country
    - 6.1.1.3 North America Advanced Packaging Wafer Level CSP Market by Country
    - 6.1.1.4 North America Advanced Packaging 2.5D/3D Market by Country
    - 6.1.1.5 North America Other Type Advanced Packaging Market by Country
  - 6.1.2 North America Advanced Packaging Market by End User
    - 6.1.2.1 North America Consumer Electronics Advanced Packaging Market by Country
    - 6.1.2.2 North America Automotive Advanced Packaging Market by Country
    - 6.1.2.3 North America Industrial Advanced Packaging Market by Country
    - 6.1.2.4 North America Aerospace & Defense Advanced Packaging Market by Country
    - 6.1.2.5 North America Healthcare & Life Sciences Advanced Packaging Market by Country
    - 6.1.2.6 North America Others Advanced Packaging Market by Country
  - 6.1.3 North America Advanced Packaging Market by Country
    - 6.1.3.1 US Advanced Packaging Market
      - 6.1.3.1.1 US Advanced Packaging Market by Type
      - 6.1.3.1.2 US Advanced Packaging Market by End User
    - 6.1.3.2 Canada Advanced Packaging Market
      - 6.1.3.2.1 Canada Advanced Packaging Market by Type

- 6.1.3.2.2 Canada Advanced Packaging Market by End User
- 6.1.3.3 Mexico Advanced Packaging Market
  - 6.1.3.3.1 Mexico Advanced Packaging Market by Type
  - 6.1.3.3.2 Mexico Advanced Packaging Market by End User
- 6.1.3.4 Rest of North America Advanced Packaging Market
  - 6.1.3.4.1 Rest of North America Advanced Packaging Market by Type
  - 6.1.3.4.2 Rest of North America Advanced Packaging Market by End User
- 6.2 Europe Advanced Packaging Market
  - 6.2.1 Europe Advanced Packaging Market by Type
    - 6.2.1.1 Europe Advanced Packaging Flip-Chip Ball Grid Array Market by Country
    - 6.2.1.2 Europe Advanced Packaging Flip Chip CSP Market by Country
    - 6.2.1.3 Europe Advanced Packaging Wafer Level CSP Market by Country
    - 6.2.1.4 Europe Advanced Packaging 2.5D/3D Market by Country
    - 6.2.1.5 Europe Other Type Advanced Packaging Market by Country
  - 6.2.2 Europe Advanced Packaging Market by End User
    - 6.2.2.1 Europe Consumer Electronics Advanced Packaging Market by Country
    - 6.2.2.2 Europe Automotive Advanced Packaging Market by Country
    - 6.2.2.3 Europe Industrial Advanced Packaging Market by Country
    - 6.2.2.4 Europe Aerospace & Defense Advanced Packaging Market by Country
    - 6.2.2.5 Europe Healthcare & Life Sciences Advanced Packaging Market by Country
    - 6.2.2.6 Europe Others Advanced Packaging Market by Country
  - 6.2.3 Europe Advanced Packaging Market by Country
    - 6.2.3.1 Germany Advanced Packaging Market
      - 6.2.3.1.1 Germany Advanced Packaging Market by Type
      - 6.2.3.1.2 Germany Advanced Packaging Market by End User
    - 6.2.3.2 UK Advanced Packaging Market
      - 6.2.3.2.1 UK Advanced Packaging Market by Type
      - 6.2.3.2.2 UK Advanced Packaging Market by End User
    - 6.2.3.3 France Advanced Packaging Market
      - 6.2.3.3.1 France Advanced Packaging Market by Type
      - 6.2.3.3.2 France Advanced Packaging Market by End User
    - 6.2.3.4 Russia Advanced Packaging Market
      - 6.2.3.4.1 Russia Advanced Packaging Market by Type
      - 6.2.3.4.2 Russia Advanced Packaging Market by End User
    - 6.2.3.5 Spain Advanced Packaging Market
      - 6.2.3.5.1 Spain Advanced Packaging Market by Type
      - 6.2.3.5.2 Spain Advanced Packaging Market by End User
    - 6.2.3.6 Italy Advanced Packaging Market
      - 6.2.3.6.1 Italy Advanced Packaging Market by Type

- 6.2.3.6.2 Italy Advanced Packaging Market by End User
- 6.2.3.7 Rest of Europe Advanced Packaging Market
  - 6.2.3.7.1 Rest of Europe Advanced Packaging Market by Type
  - 6.2.3.7.2 Rest of Europe Advanced Packaging Market by End User
- 6.3 Asia Pacific Advanced Packaging Market
  - 6.3.1 Asia Pacific Advanced Packaging Market by Type
    - 6.3.1.1 Asia Pacific Advanced Packaging Flip-Chip Ball Grid Array Market by Country
    - 6.3.1.2 Asia Pacific Advanced Packaging Flip Chip CSP Market by Country
    - 6.3.1.3 Asia Pacific Advanced Packaging Wafer Level CSP Market by Country
    - 6.3.1.4 Asia Pacific Advanced Packaging 2.5D/3D Market by Country
    - 6.3.1.5 Asia Pacific Other Type Advanced Packaging Market by Country
  - 6.3.2 Asia Pacific Advanced Packaging Market by End User
    - 6.3.2.1 Asia Pacific Consumer Electronics Advanced Packaging Market by Country
    - 6.3.2.2 Asia Pacific Automotive Advanced Packaging Market by Country
    - 6.3.2.3 Asia Pacific Industrial Advanced Packaging Market by Country
    - 6.3.2.4 Asia Pacific Aerospace & Defense Advanced Packaging Market by Country
    - 6.3.2.5 Asia Pacific Healthcare & Life Sciences Advanced Packaging Market by Country
    - 6.3.2.6 Asia Pacific Others Advanced Packaging Market by Country
  - 6.3.3 Asia Pacific Advanced Packaging Market by Country
    - 6.3.3.1 China Advanced Packaging Market
      - 6.3.3.1.1 China Advanced Packaging Market by Type
      - 6.3.3.1.2 China Advanced Packaging Market by End User
    - 6.3.3.2 Japan Advanced Packaging Market
      - 6.3.3.2.1 Japan Advanced Packaging Market by Type
      - 6.3.3.2.2 Japan Advanced Packaging Market by End User
    - 6.3.3.3 India Advanced Packaging Market
      - 6.3.3.3.1 India Advanced Packaging Market by Type
      - 6.3.3.3.2 India Advanced Packaging Market by End User
    - 6.3.3.4 South Korea Advanced Packaging Market
      - 6.3.3.4.1 South Korea Advanced Packaging Market by Type
      - 6.3.3.4.2 South Korea Advanced Packaging Market by End User
    - 6.3.3.5 Singapore Advanced Packaging Market
      - 6.3.3.5.1 Singapore Advanced Packaging Market by Type
      - 6.3.3.5.2 Singapore Advanced Packaging Market by End User
    - 6.3.3.6 Malaysia Advanced Packaging Market
      - 6.3.3.6.1 Malaysia Advanced Packaging Market by Type
      - 6.3.3.6.2 Malaysia Advanced Packaging Market by End User
    - 6.3.3.7 Rest of Asia Pacific Advanced Packaging Market

- 6.3.3.7.1 Rest of Asia Pacific Advanced Packaging Market by Type
- 6.3.3.7.2 Rest of Asia Pacific Advanced Packaging Market by End User
- 6.4 LAMEA Advanced Packaging Market
  - 6.4.1 LAMEA Advanced Packaging Market by Type
    - 6.4.1.1 LAMEA Advanced Packaging Flip-Chip Ball Grid Array Market by Country
    - 6.4.1.2 LAMEA Advanced Packaging Flip Chip CSP Market by Country
    - 6.4.1.3 LAMEA Advanced Packaging Wafer Level CSP Market by Country
    - 6.4.1.4 LAMEA Advanced Packaging 2.5D/3D Market by Country
    - 6.4.1.5 LAMEA Other Type Advanced Packaging Market by Country
  - 6.4.2 LAMEA Advanced Packaging Market by End User
    - 6.4.2.1 LAMEA Consumer Electronics Advanced Packaging Market by Country
    - 6.4.2.2 LAMEA Automotive Advanced Packaging Market by Country
    - 6.4.2.3 LAMEA Industrial Advanced Packaging Market by Country
    - 6.4.2.4 LAMEA Aerospace & Defense Advanced Packaging Market by Country
    - 6.4.2.5 LAMEA Healthcare & Life Sciences Advanced Packaging Market by Country
    - 6.4.2.6 LAMEA Others Advanced Packaging Market by Country
  - 6.4.3 LAMEA Advanced Packaging Market by Country
    - 6.4.3.1 Brazil Advanced Packaging Market
      - 6.4.3.1.1 Brazil Advanced Packaging Market by Type
      - 6.4.3.1.2 Brazil Advanced Packaging Market by End User
    - 6.4.3.2 Argentina Advanced Packaging Market
      - 6.4.3.2.1 Argentina Advanced Packaging Market by Type
      - 6.4.3.2.2 Argentina Advanced Packaging Market by End User
    - 6.4.3.3 UAE Advanced Packaging Market
      - 6.4.3.3.1 UAE Advanced Packaging Market by Type
      - 6.4.3.3.2 UAE Advanced Packaging Market by End User
    - 6.4.3.4 Saudi Arabia Advanced Packaging Market
      - 6.4.3.4.1 Saudi Arabia Advanced Packaging Market by Type
      - 6.4.3.4.2 Saudi Arabia Advanced Packaging Market by End User
    - 6.4.3.5 South Africa Advanced Packaging Market
      - 6.4.3.5.1 South Africa Advanced Packaging Market by Type
      - 6.4.3.5.2 South Africa Advanced Packaging Market by End User
    - 6.4.3.6 Nigeria Advanced Packaging Market
      - 6.4.3.6.1 Nigeria Advanced Packaging Market by Type
      - 6.4.3.6.2 Nigeria Advanced Packaging Market by End User
    - 6.4.3.7 Rest of LAMEA Advanced Packaging Market
      - 6.4.3.7.1 Rest of LAMEA Advanced Packaging Market by Type
      - 6.4.3.7.2 Rest of LAMEA Advanced Packaging Market by End User

## CHAPTER 7. COMPANY PROFILES

### 7.1 Qualcomm, Inc.

#### 7.1.1 Company Overview

#### 7.1.1 Financial Analysis

#### 7.1.2 Segmental and Regional Analysis

#### 7.1.3 Research & Development Expense

#### 7.1.4 Recent strategies and developments:

##### 7.1.4.1 Partnerships, Collaborations, and Agreements:

##### 7.1.4.2 Geographical Expansions:

#### 7.1.5 SWOT Analysis

### 7.2 Intel Corporation

#### 7.2.1 Company Overview

#### 7.2.2 Financial Analysis

#### 7.2.3 Segmental and Regional Analysis

#### 7.2.4 Research & Development Expenses

#### 7.2.5 Recent strategies and developments:

##### 7.2.5.1 Partnerships, Collaborations, and Agreements:

##### 7.2.5.2 Product Launches and Product Expansions:

#### 7.2.6 SWOT Analysis

### 7.3 IBM Corporation

#### 7.3.1 Company Overview

#### 7.3.2 Financial Analysis

#### 7.3.3 Regional & Segmental Analysis

#### 7.3.4 Research & Development Expenses

#### 7.3.5 Recent strategies and developments:

##### 7.3.5.1 Partnerships, Collaborations, and Agreements:

#### 7.3.6 SWOT Analysis

### 7.4 Texas Instruments, Inc.

#### 7.4.1 Company Overview

#### 7.4.2 Financial Analysis

#### 7.4.3 Segmental and Regional Analysis

#### 7.4.4 Research & Development Expense

#### 7.4.5 Recent strategies and developments:

##### 7.4.5.1 Product Launches and Product Expansions:

#### 7.4.6 SWOT Analysis

### 7.5 Analog Devices, Inc.

#### 7.5.1 Company Overview

#### 7.5.2 Financial Analysis



- 7.5.3 Segmental and Regional Analysis
- 7.5.4 Research & Development Expenses
- 7.5.5 SWOT Analysis
- 7.6 Renesas Electronics Corporation
  - 7.6.1 Company Overview
  - 7.6.2 Financial Analysis
  - 7.6.3 Segmental and Regional Analysis
  - 7.6.4 Research & Development Expense
  - 7.6.5 Recent strategies and developments:
    - 7.6.5.1 Product Launches and Product Expansions:
    - 7.6.5.2 Acquisition and Mergers:
- 7.7 Samsung Electronics Co., Ltd. (Samsung Group)
  - 7.7.1 Company Overview
  - 7.7.2 Financial Analysis
  - 7.7.3 Segmental and Regional Analysis
  - 7.7.4 Research & Development Expense
  - 7.7.5 Recent strategies and developments:
    - 7.7.5.1 Partnerships, Collaborations, and Agreements:
    - 7.7.5.2 Geographical Expansions:
  - 7.7.6 SWOT Analysis
- 7.8 Amkor Technology, Inc.
  - 7.8.1 Company Overview
  - 7.8.2 Financial Analysis
  - 7.8.3 Regional Analysis
  - 7.8.4 Research & Development Expense
  - 7.8.5 Recent strategies and developments:
    - 7.8.5.1 Partnerships, Collaborations, and Agreements:
    - 7.8.5.2 Acquisition and Mergers:
- 7.9 Brewer Science, Inc.
  - 7.9.1 Company Overview
  - 7.9.2 Recent strategies and developments:
    - 7.9.2.1 Product Launches and Product Expansions:
- 7.1 Microchip Technology, Inc.
  - 7.10.1 Company overview
  - 7.10.2 Financial Analysis
  - 7.10.3 Segmental and Regional Analysis
  - 7.10.4 Research & Development Expenses
  - 7.10.5 Recent strategies and developments:
    - 7.10.5.1 Geographical Expansions:



## List Of Tables

### LIST OF TABLES

TABLE 1 GLOBAL ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 2 GLOBAL ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 3 PARTNERSHIPS, COLLABORATIONS AND AGREEMENTS– ADVANCED PACKAGING MARKET

TABLE 4 PRODUCT LAUNCHES AND PRODUCT EXPANSIONS– ADVANCED PACKAGING MARKET

TABLE 5 GEOGRAPHICAL EXPANSIONS– ADVANCED PACKAGING MARKET

TABLE 6 MERGERS & ACQUISITIONS – ADVANCED PACKAGING MARKET

TABLE 7 GLOBAL ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 8 GLOBAL ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 9 GLOBAL ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 10 GLOBAL ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 11 GLOBAL ADVANCED PACKAGING FLIP CHIP CSP MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 12 GLOBAL ADVANCED PACKAGING FLIP CHIP CSP MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 13 GLOBAL ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 14 GLOBAL ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 15 GLOBAL ADVANCED PACKAGING 2.5D/3D MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 16 GLOBAL ADVANCED PACKAGING 2.5D/3D MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 17 GLOBAL OTHER TYPE ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 18 GLOBAL OTHER TYPE ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 19 GLOBAL ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 20 GLOBAL ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026,



USD MILLION

TABLE 21 GLOBAL CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 22 GLOBAL CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 23 GLOBAL AUTOMOTIVE ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 24 GLOBAL AUTOMOTIVE ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 25 GLOBAL INDUSTRIAL ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 26 GLOBAL INDUSTRIAL ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 27 GLOBAL AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 28 GLOBAL AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 29 GLOBAL HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 30 GLOBAL HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 31 GLOBAL OTHERS ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 32 GLOBAL OTHERS ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 33 GLOBAL ADVANCED PACKAGING MARKET BY REGION, 2016 - 2019, USD MILLION

TABLE 34 GLOBAL ADVANCED PACKAGING MARKET BY REGION, 2020 - 2026, USD MILLION

TABLE 35 NORTH AMERICA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 36 NORTH AMERICA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 37 NORTH AMERICA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 38 NORTH AMERICA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 39 NORTH AMERICA ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 40 NORTH AMERICA ADVANCED PACKAGING FLIP-CHIP BALL GRID  
ARRAY MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 41 NORTH AMERICA ADVANCED PACKAGING FLIP CHIP CSP MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 42 NORTH AMERICA ADVANCED PACKAGING FLIP CHIP CSP MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 43 NORTH AMERICA ADVANCED PACKAGING WAFER LEVEL CSP  
MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 44 NORTH AMERICA ADVANCED PACKAGING WAFER LEVEL CSP  
MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 45 NORTH AMERICA ADVANCED PACKAGING 2.5D/3D MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 46 NORTH AMERICA ADVANCED PACKAGING 2.5D/3D MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 47 NORTH AMERICA OTHER TYPE ADVANCED PACKAGING MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 48 NORTH AMERICA OTHER TYPE ADVANCED PACKAGING MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 49 NORTH AMERICA ADVANCED PACKAGING MARKET BY END USER,  
2016 - 2019, USD MILLION

TABLE 50 NORTH AMERICA ADVANCED PACKAGING MARKET BY END USER,  
2020 - 2026, USD MILLION

TABLE 51 NORTH AMERICA CONSUMER ELECTRONICS ADVANCED PACKAGING  
MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 52 NORTH AMERICA CONSUMER ELECTRONICS ADVANCED PACKAGING  
MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 53 NORTH AMERICA AUTOMOTIVE ADVANCED PACKAGING MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 54 NORTH AMERICA AUTOMOTIVE ADVANCED PACKAGING MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 55 NORTH AMERICA INDUSTRIAL ADVANCED PACKAGING MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 56 NORTH AMERICA INDUSTRIAL ADVANCED PACKAGING MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 57 NORTH AMERICA AEROSPACE & DEFENSE ADVANCED PACKAGING  
MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 58 NORTH AMERICA AEROSPACE & DEFENSE ADVANCED PACKAGING  
MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 59 NORTH AMERICA HEALTHCARE & LIFE SCIENCES ADVANCED

PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 60 NORTH AMERICA HEALTHCARE & LIFE SCIENCES ADVANCED

PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 61 NORTH AMERICA OTHERS ADVANCED PACKAGING MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 62 NORTH AMERICA OTHERS ADVANCED PACKAGING MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 63 NORTH AMERICA ADVANCED PACKAGING MARKET BY COUNTRY,  
2016 - 2019, USD MILLION

TABLE 64 NORTH AMERICA ADVANCED PACKAGING MARKET BY COUNTRY,  
2020 - 2026, USD MILLION

TABLE 65 US ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 66 US ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 67 US ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 68 US ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 69 US ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD  
MILLION

TABLE 70 US ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD  
MILLION

TABLE 71 CANADA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 72 CANADA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 73 CANADA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 74 CANADA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 75 CANADA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019,  
USD MILLION

TABLE 76 CANADA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026,  
USD MILLION

TABLE 77 MEXICO ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 78 MEXICO ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 79 MEXICO ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 80 MEXICO ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 81 MEXICO ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019,  
USD MILLION

TABLE 82 MEXICO ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 83 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 84 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 85 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 86 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 87 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 88 REST OF NORTH AMERICA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 89 EUROPE ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 90 EUROPE ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 91 EUROPE ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 92 EUROPE ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 93 EUROPE ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 94 EUROPE ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 95 EUROPE ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 96 EUROPE ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 97 EUROPE ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 98 EUROPE ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 99 EUROPE ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 100 EUROPE ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 101 EUROPE OTHER TYPE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 102 EUROPE OTHER TYPE ADVANCED PACKAGING MARKET BY

COUNTRY, 2020 - 2026, USD MILLION

TABLE 103 EUROPE ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 104 EUROPE ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 105 EUROPE CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 106 EUROPE CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 107 EUROPE AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 108 EUROPE AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 109 EUROPE INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 110 EUROPE INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 111 EUROPE AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 112 EUROPE AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 113 EUROPE HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 114 EUROPE HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 115 EUROPE OTHERS ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 116 EUROPE OTHERS ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 117 EUROPE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 118 EUROPE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 119 GERMANY ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 120 GERMANY ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 121 GERMANY ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 122 GERMANY ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 123 GERMANY ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 124 GERMANY ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 125 UK ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 126 UK ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 127 UK ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 128 UK ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 129 UK ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 130 UK ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 131 FRANCE ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 132 FRANCE ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 133 FRANCE ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 134 FRANCE ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 135 FRANCE ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 136 FRANCE ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 137 RUSSIA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 138 RUSSIA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 139 RUSSIA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 140 RUSSIA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 141 RUSSIA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 142 RUSSIA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 143 SPAIN ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 144 SPAIN ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 145 SPAIN ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD



MILLION

TABLE 146 SPAIN ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 147 SPAIN ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 148 SPAIN ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 149 ITALY ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 150 ITALY ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 151 ITALY ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 152 ITALY ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 153 ITALY ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 154 ITALY ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 155 REST OF EUROPE ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 156 REST OF EUROPE ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 157 REST OF EUROPE ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 158 REST OF EUROPE ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 159 REST OF EUROPE ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 160 REST OF EUROPE ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 161 ASIA PACIFIC ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 162 ASIA PACIFIC ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 163 ASIA PACIFIC ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 164 ASIA PACIFIC ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 165 ASIA PACIFIC ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 166 ASIA PACIFIC ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 167 ASIA PACIFIC ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 168 ASIA PACIFIC ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 169 ASIA PACIFIC ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 170 ASIA PACIFIC ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 171 ASIA PACIFIC ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 172 ASIA PACIFIC ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 173 ASIA PACIFIC OTHER TYPE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 174 ASIA PACIFIC OTHER TYPE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 175 ASIA PACIFIC ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 176 ASIA PACIFIC ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 177 ASIA PACIFIC CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 178 ASIA PACIFIC CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 179 ASIA PACIFIC AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 180 ASIA PACIFIC AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 181 ASIA PACIFIC INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 182 ASIA PACIFIC INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 183 ASIA PACIFIC AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 184 ASIA PACIFIC AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 185 ASIA PACIFIC HEALTHCARE & LIFE SCIENCES ADVANCED



PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 186 ASIA PACIFIC HEALTHCARE & LIFE SCIENCES ADVANCED

PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 187 ASIA PACIFIC OTHERS ADVANCED PACKAGING MARKET BY  
COUNTRY, 2016 - 2019, USD MILLION

TABLE 188 ASIA PACIFIC OTHERS ADVANCED PACKAGING MARKET BY  
COUNTRY, 2020 - 2026, USD MILLION

TABLE 189 ASIA PACIFIC ADVANCED PACKAGING MARKET BY COUNTRY, 2016 -  
2019, USD MILLION

TABLE 190 ASIA PACIFIC ADVANCED PACKAGING MARKET BY COUNTRY, 2020 -  
2026, USD MILLION

TABLE 191 CHINA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 192 CHINA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 193 CHINA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 194 CHINA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 195 CHINA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019,  
USD MILLION

TABLE 196 CHINA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026,  
USD MILLION

TABLE 197 JAPAN ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 198 JAPAN ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 199 JAPAN ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 200 JAPAN ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 201 JAPAN ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019,  
USD MILLION

TABLE 202 JAPAN ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026,  
USD MILLION

TABLE 203 INDIA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 204 INDIA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 205 INDIA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD  
MILLION

TABLE 206 INDIA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD  
MILLION

TABLE 207 INDIA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019,  
USD MILLION

TABLE 208 INDIA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 209 SOUTH KOREA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 210 SOUTH KOREA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 211 SOUTH KOREA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 212 SOUTH KOREA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 213 SOUTH KOREA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 214 SOUTH KOREA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 215 SINGAPORE ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 216 SINGAPORE ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 217 SINGAPORE ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 218 SINGAPORE ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 219 SINGAPORE ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 220 SINGAPORE ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 221 MALAYSIA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 222 MALAYSIA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 223 MALAYSIA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 224 MALAYSIA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 225 MALAYSIA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 226 MALAYSIA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 227 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET, 2016 -

2019, USD MILLION

TABLE 228 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 229 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 230 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 231 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 232 REST OF ASIA PACIFIC ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 233 LAMEA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 234 LAMEA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 235 LAMEA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 236 LAMEA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 237 LAMEA ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 238 LAMEA ADVANCED PACKAGING FLIP-CHIP BALL GRID ARRAY MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 239 LAMEA ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 240 LAMEA ADVANCED PACKAGING FLIP CHIP CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 241 LAMEA ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 242 LAMEA ADVANCED PACKAGING WAFER LEVEL CSP MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 243 LAMEA ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 244 LAMEA ADVANCED PACKAGING 2.5D/3D MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 245 LAMEA OTHER TYPE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 246 LAMEA OTHER TYPE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 247 LAMEA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 248 LAMEA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 249 LAMEA CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 250 LAMEA CONSUMER ELECTRONICS ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 251 LAMEA AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 252 LAMEA AUTOMOTIVE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 253 LAMEA INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 254 LAMEA INDUSTRIAL ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 255 LAMEA AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 256 LAMEA AEROSPACE & DEFENSE ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 257 LAMEA HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 258 LAMEA HEALTHCARE & LIFE SCIENCES ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 259 LAMEA OTHERS ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 260 LAMEA OTHERS ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 261 LAMEA ADVANCED PACKAGING MARKET BY COUNTRY, 2016 - 2019, USD MILLION

TABLE 262 LAMEA ADVANCED PACKAGING MARKET BY COUNTRY, 2020 - 2026, USD MILLION

TABLE 263 BRAZIL ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 264 BRAZIL ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 265 BRAZIL ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 266 BRAZIL ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 267 BRAZIL ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 268 BRAZIL ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026,

USD MILLION

TABLE 269 ARGENTINA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 270 ARGENTINA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 271 ARGENTINA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 272 ARGENTINA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 273 ARGENTINA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 274 ARGENTINA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 275 UAE ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 276 UAE ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 277 UAE ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 278 UAE ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 279 UAE ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 280 UAE ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 281 SAUDI ARABIA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 282 SAUDI ARABIA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 283 SAUDI ARABIA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 284 SAUDI ARABIA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 285 SAUDI ARABIA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 286 SAUDI ARABIA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 287 SOUTH AFRICA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 288 SOUTH AFRICA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 289 SOUTH AFRICA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 290 SOUTH AFRICA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 291 SOUTH AFRICA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 292 SOUTH AFRICA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 293 NIGERIA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 294 NIGERIA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 295 NIGERIA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 296 NIGERIA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 297 NIGERIA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 298 NIGERIA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 299 REST OF LAMEA ADVANCED PACKAGING MARKET, 2016 - 2019, USD MILLION

TABLE 300 REST OF LAMEA ADVANCED PACKAGING MARKET, 2020 - 2026, USD MILLION

TABLE 301 REST OF LAMEA ADVANCED PACKAGING MARKET BY TYPE, 2016 - 2019, USD MILLION

TABLE 302 REST OF LAMEA ADVANCED PACKAGING MARKET BY TYPE, 2020 - 2026, USD MILLION

TABLE 303 REST OF LAMEA ADVANCED PACKAGING MARKET BY END USER, 2016 - 2019, USD MILLION

TABLE 304 REST OF LAMEA ADVANCED PACKAGING MARKET BY END USER, 2020 - 2026, USD MILLION

TABLE 305 KEY INFORMATION – QUALCOMM, INC.

TABLE 306 KEY INFORMATION – INTEL CORPORATION

TABLE 307 KEY INFORMATION – IBM CORPORATION

TABLE 308 KEY INFORMATION – TEXAS INSTRUMENTS, INC.

TABLE 309 KEY INFORMATION – ANALOG DEVICES, INC.

TABLE 310 KEY INFORMATION – RENESAS ELECTRONICS CORPORATION

TABLE 311 KEY INFORMATION – SAMSUNG ELECTRONICS CO., LTD.

TABLE 312 KEY INFORMATION – AMKOR TECHNOLOGY, INC.

TABLE 313 KEY INFORMATION – BREWER SCIENCE, INC.

TABLE 314 KEY INFORMATION – MICROCHIP TECHNOLOGY, INC.



## List Of Figures

### LIST OF FIGURES

FIG 1 METHODOLOGY FOR THE RESEARCH

FIG 2 KBV CARDINAL MATRIX

FIG 3 KEY LEADING STRATEGIES: PERCENTAGE DISTRIBUTION (2016-2020)

FIG 4 KEY STRATEGIC MOVE: (PARTNERSHIPS, COLLABORATIONS, AND AGREEMENTS : 2016, JAN – 2019,DEC) LEADING PLAYERS

FIG 5 RECENT STRATEGIES AND DEVELOPMENTS: QUALCOMM, INC.

FIG 6 SWOT ANALYSIS: QUALCOMM, INC.

FIG 7 RECENT STRATEGIES AND DEVELOPMENTS: INTEL CORPORATION

FIG 8 SWOT ANALYSIS: INTEL CORPORATION

FIG 9 SWOT ANALYSIS: IBM CORPORATION

FIG 10 SWOT ANALYSIS: TEXAS INSTRUMENTS, INC.

FIG 11 SWOT ANALYSIS: ANALOG DEVICES, INC.

FIG 12 RECENT STRATEGIES AND DEVELOPMENTS: RENESAS ELECTRONICS CORPORATION

FIG 13 RECENT STRATEGIES AND DEVELOPMENTS: SAMSUNG ELECTRONICS CO., LTD.

FIG 14 SWOT ANALYSIS: SAMSUNG ELECTRONICS CO. LTD.

FIG 15 RECENT STRATEGIES AND DEVELOPMENTS: AMKOR TECHNOLOGY, INC.



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