

Global Epoxy Molding Compound (EMC) for Advanced Packaging Market Growth 2026-2032

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Abstracts

The global Epoxy Molding Compound (EMC) for Advanced Packaging market size is predicted to grow from US\$ 677 million in 2025 to US\$ 1049 million in 2032; it is expected to grow at a CAGR of 6.6% from 2026 to 2032.

Epoxy molding compounds for advanced packaging are thermosetting composite materials based on epoxy resin, formulated with curing agents, inorganic fillers (such as silica), and additives—including accelerators, coupling agents, mold release agents, flame retardants, and performance modifiers. They are used to encapsulate, fill gaps, or perform molded underfill on wafers, reconstituted wafers, panels, chips, interconnect structures, and packaging substrates via processes such as transfer molding, compression molding, vacuum molding, or film-assisted molding. Their primary functions include providing electrical insulation, mechanical support, protection against moisture and contamination, interconnect protection, and thermomechanical stress management. Furthermore, through designs featuring low warpage, low thermal expansion, low stress, high thermal conductivity, fine fillers, high purity, and high reliability, they meet the packaging requirements of FOWLP, FOPLP, FC-BGA, FC-CSP, SiP, MUF, stacked memory, Chiplets, 2.5D/3D heterogeneous integration, and advanced power modules.

This report focuses on molding materials used directly in FOWLP, FOPLP, flip-chip BGA/CSP, molded underfill (MUF), system-in-package (SiP), high-bandwidth memory (HBM), chiplet packaging, 2.5D/3D integration, and advanced power modules. Compared with conventional EMC, this market has a smaller volume base, but liquid compression molding materials, molded underfill compounds, and film-type products generally command higher unit values. As semiconductor packaging evolves from single-die protection toward multi-die system integration, EMC is also transitioning from

an external protective material into a critical structural material that directly affects package warpage, interconnect reliability, die shift, mold-flow defects, and overall packaging yield.

From the supply perspective, the global advanced-packaging EMC market remains strongly dominated by Japanese companies. Sumitomo Bakelite, Resonac, Panasonic Industry, NAMICS, Shin-Etsu Chemical, and Kyocera collectively cover multiple product routes, including conventional solid EMC, granular compression molding compounds, molded underfill materials, liquid molding compounds, and sheet-type materials. These suppliers maintain leading positions through long-established formulation expertise, extensive qualification experience with semiconductor packaging customers, and localized manufacturing capabilities across Asia.

From the demand perspective, AI accelerators, high-performance computing, HBM, chiplet architectures, and multi-die heterogeneous integration are expected to represent the primary sources of incremental growth over the next several years. Advanced packaging integrates more logic dies, memory devices, interposers, and interconnect structures within a single package. Larger package dimensions, increased die-stacking levels, and narrower interconnect pitches require molding materials to simultaneously provide low warpage, low stress, fine-gap filling capability, strong adhesion, and high reliability. Industry developments disclosed by SEMI indicate that semiconductor capital expenditure since 2025 has continued to shift toward advanced logic, HBM, and advanced packaging, with AI and high-performance computing becoming major investment drivers for 2.5D, 3D, fan-out, and chiplet technologies. At the same time, vehicle electrification and industrial power electronics are driving SiC, GaN, and highly integrated power modules toward higher junction temperatures and greater power density, creating a separate growth pathway for high-Tg, thermally conductive, and low-stress EMC products.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Epoxy Molding Compound (EMC) for Advanced Packaging Industry Forecast" looks at past sales and reviews total world Epoxy Molding Compound (EMC) for Advanced Packaging sales in 2025, providing a comprehensive analysis by region and market sector of projected Epoxy Molding Compound (EMC) for Advanced Packaging sales for 2026 through 2032. With Epoxy Molding Compound (EMC) for Advanced Packaging sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Epoxy Molding Compound (EMC) for Advanced Packaging

industry.

This Insight Report provides a comprehensive analysis of the global Epoxy Molding Compound (EMC) for Advanced Packaging landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Epoxy Molding Compound (EMC) for Advanced Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Epoxy Molding Compound (EMC) for Advanced Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Epoxy Molding Compound (EMC) for Advanced Packaging and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Epoxy Molding Compound (EMC) for Advanced Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Epoxy Molding Compound (EMC) for Advanced Packaging market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Liquid Molding Compounds (LMC)

Granular/Powder EMC

Sheet and Film-type EMC

Segmentation by Process:

Transfer Molding Grade

Compression Molding Grade

Sheet and Film Molding Grade

Segmentation by Application:

Fan-Out Wafer-Level Packaging

Fan-Out Panel-Level Packaging

Flip-Chip BGA and CSP Packaging

System-in-Package

2.5D and 3D Integration Packaging

Chiplet Packaging

High Bandwidth Memory and Stacked Memory Packaging

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Sumitomo Bakelite Co., Ltd.

Resonac Corporation

Panasonic Industry Co., Ltd.

Samsung SDI Co., Ltd.

Henkel AG & Co. KGaA

NAMICS Corporation

KCC Corporation

Shin-Etsu Chemical Co., Ltd.

Kyocera Corporation

Jiangsu Zhongke Kehua New Materials Co., Ltd.

Jiangsu HHCK Advanced Materials Co., Ltd.

Eternal Materials Co., Ltd.

Sanyu Rec Co., Ltd.

PhiChem Corporation

WaferChem Technology Corporation

SP Samhwa Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Epoxy Molding Compound (EMC) for Advanced Packaging market?

What factors are driving Epoxy Molding Compound (EMC) for Advanced Packaging market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Epoxy Molding Compound (EMC) for Advanced Packaging market opportunities vary by end market size?

How does Epoxy Molding Compound (EMC) for Advanced Packaging break out by Type, by Application?

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