

Global Epoxy Underfill Adhesive Market Growth 2026-2032

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Abstracts

The global Epoxy Underfill Adhesive market size is predicted to grow from US\$ 636 million in 2025 to US\$ 1424 million in 2032; it is expected to grow at a CAGR of 12.4% from 2026 to 2032.

Epoxy underfill adhesive is a high-reliability insulating encapsulation material used in semiconductor packaging and board-level assembly. It is typically supplied as a one-component or pre-formulated heat-curable epoxy system in liquid or paste form, and after cure it forms a cross-linked polymer network. Functional fillers such as silica are often incorporated to optimize coefficient of thermal expansion, flow behavior, mechanical strength, and long-term reliability. The material fills the narrow gap between the chip and the substrate through capillary action or through no-flow and molded processes, creating stress redistribution and structural reinforcement around solder joints, bumps, and interconnects. Its main product categories include capillary underfill, no-flow underfill, and molded underfill, and its key applications cover flip chip, ball grid array, chip scale package, wafer level chip scale package, advanced packaging, automotive electronics, mobile devices, data center hardware, and high-performance computing.

In 2025, global epoxy underfill adhesive production reached approximately 320 to 520 tons. Based on publicly visible advanced packaging capacity expansion, rising demand from artificial intelligence and high-performance computing related packages, and commercial pricing samples for packaging-grade underfill materials, the representative free-on-board price generally ranged from about US\$900 to US\$2,600 per kilogram in 2025.

The global epoxy underfill adhesive market is moving rapidly from a conventional

package protection material toward a critical reliability enabler for advanced semiconductor packaging. As artificial intelligence training and inference processors, high-bandwidth memory, chiplet architectures, and heterogeneous integration continue to scale, package structures are shifting toward larger body sizes, finer pitches, and higher thermal loads. This is raising material requirements for low voiding, fast and uniform flow, low coefficient of thermal expansion, high glass transition temperature, and high cleanliness. TSMC has repeatedly highlighted the importance of advanced packaging and three-dimensional stacking technologies for high-performance computing, while Amkor has also stated that high-performance computing and artificial intelligence are driving technology innovation and demand for advanced packaging. This means underfill is no longer merely a conventional assembly material, but an increasingly high-value solution tightly linked to package design, process compatibility, and customer qualification.

From a commercial perspective, growth is no longer driven solely by consumer electronics. It is increasingly supported by a broader mix of consumer electronics, data center infrastructure, artificial intelligence accelerators, automotive electronics, and high-reliability industrial electronics. In server processors, advanced memory packages, and automotive control modules, underfill plays a more critical role in thermal cycling endurance, drop performance, and long service life. At the same time, the market faces clear constraints. Finer pitch structures and thinner die designs require a more precise balance among rheology, filler loading, cure profile, flux compatibility, and reworkability. Long qualification cycles, strict consistency requirements, and high process sensitivity mean that competition is centered more on formulation know-how, field application support, and global delivery capability than on simple price competition. As international suppliers accelerate the development of new materials for large-body artificial-intelligence and high-performance-computing packages, the next phase of competition will increasingly focus on advanced packaging compatibility, automotive-grade reliability, and ecosystem alignment with leading outsourced assembly and test providers, integrated device manufacturers, and foundries.

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

This Insight Report provides a comprehensive analysis of the global Epoxy Underfill Adhesive 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 Underfill Adhesive portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Epoxy Underfill Adhesive market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Epoxy Underfill Adhesive 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 Underfill Adhesive.

This report presents a comprehensive overview, market shares, and growth opportunities of Epoxy Underfill Adhesive market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Package Level Underfill

Board Level Underfill

Wafer Level Underfill

Segmentation by Form:

Liquid

Pre-Molded

Dry Film

Segmentation by Curing Technology:

Capillary Underfill

No-Flow Underfill

Others

Segmentation by Filler Type:

Silica-Filled

Nano-Filled

Others

Segmentation by Application:

Consumer Electronics

Automotive Electronics

Telecommunications And Infrastructure

Defense And Aerospace Electronics

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.

Hubei Huitian New Materials Co., Ltd. (?????)

Darbond Technology Co., Ltd. (darbond.com)

Henkel AG & Co. KGaA (henkel.com)

Element Solutions Inc (elementsolutionsinc.com)

NAMICS Corporation (???????????)

Resonac Corporation (resonac.com)

Shin-Etsu Chemical Co., Ltd. (shinetsu.co.jp)

Dexerials Corporation (dexerials.jp)

H.B. Fuller Company (hbfuller.com)

ThreeBond Co., Ltd. (threebond.co.jp)

Hoenle AG (Hoenle)

Zymet, Inc. (zymet.com)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Epoxy Underfill Adhesive market?

What factors are driving Epoxy Underfill Adhesive market growth, globally and by region?

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

How do Epoxy Underfill Adhesive market opportunities vary by end market size?

How does Epoxy Underfill Adhesive break out by Type, by Application?

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