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Global Liquid Epoxy Molding Compounds Market Growth 2026-2032

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Abstracts

The global Liquid Epoxy Molding Compounds market size is predicted to grow from US$ 323 million in 2025 to US$ 602 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

Liquid Epoxy Molding Compounds (LEMC/LMC) are thermosetting semiconductor encapsulation materials formulated from liquid epoxy resin systems, curing agents, high-load inorganic fillers and functional additives. They are primarily processed by compression molding and related molding methods to encapsulate reconstituted wafers, panels, stacked dies and other advanced package structures, while selected grades can also provide molded-underfill functionality. Commercial formulations are engineered for controlled viscosity and high flow, low-temperature or fast cure, low CTE and warpage, low moisture uptake, strong adhesion, high purity and tailored thermal conductivity. Key procurement and qualification parameters include cure temperature, viscosity and flow behavior, filler loading and maximum particle size, CTE, glass-transition temperature, thermal conductivity, ionic purity and reliability performance. Major uses include wafer- and panel-level packaging, 2.5D/3D heterogeneous integration, chiplets, HBM and other high-density semiconductor packages.

Market Trends

Liquid epoxy molding compounds are evolving from specialized wafer-level materials into a broader advanced-packaging platform. As reconstituted wafer sizes grow, panel-level packaging advances and die stacks become denser, low-viscosity high-flow behavior, low-temperature fast cure, fine-filler high loading and low warpage are becoming central formulation priorities. High-thermal-conductivity, high-reliability and molded-underfill-capable grades are gaining importance for HBM and high-power

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computing packages.

Market Dynamics

Drivers: AI/HPC, chiplets, HBM and fan-out packaging are increasing requirements for large-area molding, fine-gap filling and thermomechanical reliability, supporting broader adoption of liquid compression molding materials.

Restraints: Formulators must balance viscosity, filler loading, flow, cure shrinkage and warpage, while long advanced-package qualification cycles and stringent batch-consistency and ionic-purity requirements slow new-supplier ramp-up.

Opportunities: Panel-level fan-out, HBM, 2.5D/3D heterogeneous integration and semiconductor-material localization in China create additional qualification opportunities, particularly for low-temperature, high-thermal and integrated molded-underfill solutions.

Challenges: Stable dispersion and degassing of highly filled systems, fine-filler supply, void-free filling in complex structures, mass-production process windows and material-equipment co-optimization remain key technical hurdles.

Industry Chain Analysis

Upstream inputs include high-purity epoxy resins, curing agents, spherical silica and other inorganic fillers, tougheners, coupling agents and functional additives. Midstream suppliers create the molding material through formulation, filler surface treatment, dispersion, degassing, filtration and clean filling, followed by joint qualification with compression-molding equipment and customer processes. Downstream demand is concentrated in wafer-level, panel-level, memory and heterogeneous-integration packaging. Value creation is driven more by formulation-process co-optimization, low-defect mass production and long-term reliability than by the base resin alone.

Segment Insights

Low-temperature, low-warpage grades are increasingly important for large-area wafer and panel formats, while high-thermal grades gain value in HBM and other high-heat-flux packages. High filler loading supports thermomechanical stability, whereas fine-filler systems improve narrow-gap filling, requiring package-specific trade-offs among viscosity, flow and reliability.

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Downstream Market Opportunities

Data centers and AI computing represent a major incremental demand pool as HBM, GPU/accelerator and chiplet platforms require better heat transfer, lower stress and more reliable large-area molding. Mobile devices, telecom infrastructure, automotive and industrial electronics provide broader reliability-driven demand across a more diversified customer base.

Regional Insights

Asia Pacific remains the center of production, qualification and consumption. Japan retains strong formulation capabilities, Korea benefits from HBM-led packaging investment, Taiwan and mainland China continue to expand advanced-packaging capacity and local material qualification, and Southeast Asia is adding OSAT capacity. North American demand is pulled by AI chip design and high-performance computing ecosystems, while Europe is more oriented toward automotive, industrial and power-electronics packaging.

Competitive Landscape Analysis

The market is qualification-intensive and closely tied to customer process know-how. Nagase ChemteX, Panasonic Industry, Ajinomoto Fine-Techno, Eternal Materials and Henkel maintain liquid-compression or wafer-level encapsulation portfolios, while Sumitomo Bakelite is advancing a new liquid encapsulant platform and Chinese suppliers such as Phichem are accelerating low-warpage, high-flow materials for advanced packaging. Competition centers on warpage control, fine-gap filling, thermal performance, purity, lot-to-lot consistency and the ability to co-optimize materials with customer molding conditions.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Liquid Epoxy Molding Compounds 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 Liquid Epoxy Molding Compounds.

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

Market Segmentation

Segmentation by Type:

Low-Temperature Curing (?130°C)

Standard-Temperature Curing (>130°C)

Segmentation by Thermal Conductivity:

Standard Thermal Conductivity (<1.5 W/m·K)

High Thermal Conductivity (1.5–<3.0 W/m·K)

Ultra-High Thermal Conductivity (?3.0 W/m·K)

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Segmentation by Filler Content:

Standard Filler Content (<80 wt%)

High Filler Content (80–<90 wt%)

Ultra-High Filler Content (?90 wt%)

Segmentation by Maximum Filler Size:

Fine-Filler Grade (?25 ?m)

Medium-Filler Grade (>25–50 ?m)

Coarse-Filler Grade (>50 ?m)

Segmentation by Application:

Data Centers and AI Computing

Smartphones and Mobile Devices

Telecommunications Infrastructure

Automotive Electronics

Industrial Electronics

Other Electronics

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa

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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.

Nagase ChemteX

Panasonic Industry

Sumitomo Bakelite

Ajinomoto Fine-Techno

Eternal Materials

Phichem

Henkel

Hysol EM

Key Questions Addressed in this Report

What is the 10-year outlook for the global Liquid Epoxy Molding Compounds market?

What factors are driving Liquid Epoxy Molding Compounds market growth, globally and by region?

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

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How do Liquid Epoxy Molding Compounds market opportunities vary by end market size?

How does Liquid Epoxy Molding Compounds break out by Type, by Application?

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