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# Global PCB Underfill Encapsulants Market Growth 2026-2032

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## Abstracts

The global PCB Underfill Encapsulants market size is predicted to grow from US$ 355 million in 2025 to US$ 509 million in 2032; it is expected to grow at a CAGR of 5.3% from 2026 to 2032.

PCB Underfill Encapsulants are electronic packaging protection materials used to fill the narrow gap between packaged semiconductor devices and printed circuit boards. They are applied through capillary flow, edge bonding, corner bonding, or no-flow processes under BGA, CSP, WLCSP, LGA, flip-chip, and similar area-array devices, and form a continuous insulating protection layer after curing. Their primary function is to redistribute thermomechanical stress on solder joints, reduce fatigue risks caused by drop impact, vibration, thermal cycling, and humid heat, and improve board-level interconnect reliability, impact resistance, and long-term operating stability.

PCB Underfill Encapsulants are mainly based on one-component epoxy systems, combined with low-CTE fillers such as silica, latent curing agents, rheology modifiers, and low-ionic-contamination control systems. Commercial products are typically supplied in syringes, cartridges, or prepacked dispensing formats. Major production and technology supply regions include Japan, the United States, Germany, China, and Taiwan, with applications across smartphones, wearable devices, automotive electronic control modules, servers, communication equipment, industrial controls, medical electronics, and high-reliability electronic assemblies.

In 2025, global PCB Underfill Encapsulants production reached approximately 2,900 to 3,300 metric tons, with mainstream FOB average prices at around USD 110 to USD 130 per kilogram. Standard capillary-flow products for consumer electronics and communication equipment were priced at the lower end of the range, while low-ionic,

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low-CTE, fast-curing, reworkable, or high-reliability grades for automotive electronics, BGA/CSP, and fine-pitch WLCSP applications commanded higher prices. Overall industry pricing was mainly affected by epoxy resin costs, spherical silica fillers, low-ionic purification requirements, customer qualification cycles, and small-batch high-specification orders.

The growth of PCB Underfill Encapsulants is primarily driven by electronic miniaturization, high-density packaging, and rising reliability requirements for board-level interconnects. As BGA, CSP, WLCSP, flip-chip, and system-level modules gain broader adoption in smartphones, wearable devices, automotive control units, servers, communication equipment, and industrial controls, solder joints are becoming smaller, package gaps are narrowing, and thermomechanical stress concentration is becoming more severe. Underfill materials are therefore shifting from optional reliability-enhancement materials to critical process materials. Automotive electronics and high-performance computing represent the clearest growth areas, with automotive applications requiring stricter validation for thermal cycling, drop impact, vibration, humid heat, and long-term aging, while computing applications push materials toward lower CTE, faster flow, lower voiding, lower ionic contamination, and higher Tg.

The main market challenges include long qualification cycles, high customer-entry barriers, narrow process windows, and concentration of high-end formulation capabilities. Underfill materials must balance flowability, curing speed, solder-joint stress relief, ionic cleanliness, reworkability, humid-heat resistance, and dispensing consistency, creating substantial formulation trade-offs. High-reliability customers usually require extended validation programs, and supplier switching costs are relatively high, giving established material leaders strong customer stickiness in automotive, communication, and premium consumer electronics accounts. At the same time, the migration of electronics manufacturing toward East Asia and Southeast Asia is creating regional supply opportunities. Chinese material suppliers are accelerating substitution in mid-range consumer electronics, module assembly, and selected automotive electronics programs, although further progress is still required in high-reliability, ultra-fine-pitch, and global customer qualification projects.

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

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Encapsulants industry.

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

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

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

## Segmentation by Type:

Epoxy Based Underfill

Acrylic Based Underfill

Others

## Segmentation by Package Type:

BGA and CSP Packages

WLCSP Packages

Flip Chip Packages

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Others

## Segmentation by Cure Mechanism:

Thermal Cure Underfill

Dual Cure Underfill

Ultraviolet Cure Underfill

Others

## Segmentation by Underfill Process:

Capillary Flow Full Underfill

Edge and Corner Bond Underfill

No Flow Underfill

Others

## Segmentation by Application:

Consumer Electronics

Automotive Electronics

Computing and Communications

Others

## This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

Henkel AG & Co. KGaA

NAMICS Corporation

Panasonic Industry Co., Ltd.

Resonac Corporation

Shin-Etsu Chemical Co., Ltd.

Sanyu Rec Co., Ltd.

ThreeBond Co., Ltd.

H.B. Fuller Company

Parker Hannifin Corporation

Master Bond Inc.

Zymet Inc.

AI Technology, Inc.

Meridian Adhesives Group

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Epoxyset Inc.

YINCAE Advanced Materials, LLC

Panacol-Elosol GmbH

Protavic International

Roartis BV

Everwide Chemical Co., Ltd.

Eternal Materials Co., Ltd.

Darbond Technology Co., Ltd.

Hubei Huitian New Materials Co., Ltd.

## Key Questions Addressed in this Report

What is the 10-year outlook for the global PCB Underfill Encapsulants market?

What factors are driving PCB Underfill Encapsulants market growth, globally and by region?

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

How do PCB Underfill Encapsulants market opportunities vary by end market size?

How does PCB Underfill Encapsulants break out by Type, by Application?

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