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Global Semiconductor Packaging Underfill Adhesives Market Growth 2026-2032

https://marketpublishers.com/r/GE43E168526EEN.html
Date: October 2026
Pages: 157
Price: US$ 3,660.00 (Single User License)
ID: GE43E168526EEN

Abstracts

The global Semiconductor Packaging Underfill Adhesives market size is predicted to grow from US$ 880 million in 2025 to US$ 1850 million in 2032; it is expected to grow at a CAGR of 11.4% from 2026 to 2032.

Semiconductor Packaging Underfill Adhesives are essential materials used in the semiconductor packaging process, primarily serving to fill the gaps between the chip and the substrate, enhancing the mechanical strength and thermal stability of the package. Typically applied in high-density packaging technologies like BGA (Ball Grid Array) and CSP (Chip-on-Substrate), underfill adhesives form a strong bonding layer at the bottom of the chip, effectively mitigating the stress caused by thermal cycling and preventing mechanical damage and cracks between the chip and the substrate. Additionally, these adhesives offer excellent electrical insulation properties and corrosion resistance, providing essential protection to electronic components from external environmental factors.

The selection and application of underfill adhesives directly impact the performance and reliability of semiconductor packaging. As electronic products continue to evolve towards higher performance, miniaturization, and integration, the demands on packaging materials have become more stringent. Underfill adhesives must not only exhibit high thermal stability and mechanical strength but also possess excellent flowability and ease of use to meet the diverse requirements of different packaging processes. Therefore, research and development of underfill adhesives is a critical area within the semiconductor packaging industry.

As of 2024, the global Semiconductor Packaging Underfill Adhesives market is estimated to have an annual production volume of 250–350 tons, primarily consisting of

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epoxy-based and inorganic-modified formulations. Based on a weighted average across packaging applications, the mainstream global ex-factory price is approximately USD 2,500–3,000 per kilogram.

With the continuous advancement of semiconductor technology, particularly the rapid expansion in high-tech applications such as 5G, Artificial Intelligence (AI), and the Internet of Things (IoT), the semiconductor packaging market is experiencing significant growth opportunities. As one of the core materials in the semiconductor packaging process, underfill adhesives are also seeing a surge in demand. Underfill adhesives play a crucial role not only in traditional BGA (Ball Grid Array) and CSP (Chip-on-Substrate) technologies but are also becoming increasingly widespread in advanced packaging technologies such as 3D packaging and System-in-Package (SiP). These technologies demand higher thermal stability, mechanical strength, and flowability, providing a strong driving force for the development of the underfill adhesives market.

The primary drivers behind the growth of the underfill adhesives market are the rising demand for high-performance electronic products and the continuous innovation in chip packaging processes. As the demand for semiconductor packaging technology grows in industries such as smartphones, automotive electronics, and cloud computing, the need for underfill adhesives continues to rise. In particular, within the high-end smartphone market and the ongoing electrification and intelligence of the automotive industry, the requirements for packaging technology and materials are becoming more stringent. These industries are demanding enhanced thermal cycling performance, mechanical reliability, and resistance to high-temperature environments. Therefore, the development of underfill adhesives is driven not only by technological advancements but also by the evolving demands of downstream industries.

Furthermore, with the global trend of miniaturization and lightweighting of electronic products, the demand for underfill adhesives is gradually expanding from traditional consumer electronics to automotive, medical devices, and other sectors. These industries require high reliability and long product lifecycles, raising the technical barriers for packaging materials, which in turn drives innovation and technological advancements in underfill adhesives. Looking ahead, the underfill adhesives market is expected to continue benefiting from developments in semiconductor packaging technology and the changing demands of downstream industries, leading to sustained market growth.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Semiconductor Packaging Underfill Adhesives 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 Semiconductor Packaging Underfill Adhesives.

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

Market Segmentation

Segmentation by Type:

Molded Underfill (MUF)

Wafer-Level Underfill (WLUF)

Reworkable Underfill

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Segmentation by Capillary Flowability:

Capillary Flow Underfill (CFU)

No-Flow Underfill (NFU)

Segmentation by Material Type:

Epoxy-based Underfill

Polyurethane-based Underfill

Silicone-based Underfill

Segmentation by Curing Method:

Thermal Cured Underfill

UV Cured Underfill

Segmentation by Application:

Industrial Electronics

Consumer Electronics

Automotive Electronics

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

NAMICS Corporation

Panasonic Lexcm

Resonac (Showa Denko)

Hanstars

Shin-Etsu Chemical

MacDermid Alpha

ThreeBond

Parker LORD

Nagase ChemteX

Bondline

AIM Solder

Zymet

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Panacol-Elosol GmbH

Dover

Darbond Technology

Yantai Hightite Chemicals

Sunstar

DeepMaterial

SINY

GTA Material

H.B.Fuller

Fuji Chemical

United Adhesives

Asec Co.,Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Semiconductor Packaging Underfill Adhesives market?

What factors are driving Semiconductor Packaging Underfill Adhesives market growth, globally and by region?

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

How do Semiconductor Packaging Underfill Adhesives market opportunities vary by end market size?

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How does Semiconductor Packaging Underfill Adhesives break out by Type, by Application?

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