

Global Thermally Conductive Epoxy Die Attach Market Growth 2026-2032

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Abstracts

The global Thermally Conductive Epoxy Die Attach market size is predicted to grow from US\$ 118 million in 2025 to US\$ 190 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

Thermally conductive epoxy die attach adhesive is a functional bonding material used in the die attach step of semiconductor packaging. It uses epoxy resin as the matrix and incorporates silver, aluminum nitride, alumina, diamond, or composite ceramic fillers to improve heat transfer, forming a stable mechanical bond and a controlled thermal path between the die and the lead frame, ceramic substrate, PCB, package substrate, or heat dissipation structure. This material addresses issues such as junction temperature rise, excessive thermal resistance, thermal cycling failure, reduced damp-heat reliability, and bond-line voids in high-power-density devices, while enabling either electrically conductive and thermally conductive designs or electrically insulating and thermally conductive designs depending on package architecture. Common delivery forms include one-component heat-curing paste, two-component paste, premixed frozen adhesive, B-staged film, and materials designed for dispensing, pin transfer, screen printing, or wafer backside coating. Typical applications include power semiconductors, automotive power devices, LED and laser diodes, RF and microwave devices, optoelectronic devices, hybrid integrated circuits, and high-performance computing chip packaging. Key competitive factors include thermal conductivity, volume resistivity, ionic contamination, curing window, rheological stability, bond line thickness control, die shear strength, moisture absorption, and long-term thermal cycling reliability.

Thermally conductive epoxy die attach adhesive is at a critical stage in which semiconductor packaging materials are evolving from general-purpose bonding materials into functional thermal management materials. As chip operating power,

packaging density, and heat generation per unit area continue to rise, the die attach layer is no longer merely a bonding medium that supports the chip. It has become a core interface that determines junction temperature, thermal resistance, warpage, interfacial stress, and long-term reliability. Epoxy systems provide strong adhesion, formulation flexibility, damp-heat resistance, and process compatibility. By incorporating silver, aluminum nitride, alumina, diamond, and composite ceramic fillers, suppliers can achieve different levels of thermal conductivity and select either electrically conductive and thermally conductive designs or electrically insulating and thermally conductive designs depending on the device's electrical architecture. As packaging requirements rise for power semiconductors, automotive electronics, LEDs, laser diodes, RF devices, and high-performance computing chips, customer evaluation criteria are expanding beyond viscosity, curing time, and bond strength to include thermal conductivity, volume resistivity, bond line thickness, low voiding, low ionics, moisture absorption, thermal cycling life, and automated dispensing stability. This shift will continue to raise the technical threshold for high-end thermally conductive epoxy die attach adhesives and encourage suppliers to pursue deeper formulation customization around package structures, die sizes, and heat dissipation paths.

From the supply perspective, the market features parallel development by international leaders and regional substitution suppliers. European, American, and Japanese suppliers have accumulated long-standing expertise in high-reliability microelectronic packaging materials and generally offer more complete portfolios, reliability databases, and cross-regional customer qualification capabilities. Their product coverage includes conductive die attach adhesives, electrically insulating thermal adhesives, B-staged films, premixed frozen adhesives, wafer backside coating materials, and high-thermal-conductivity specialty materials. At the same time, suppliers in mainland China, Taiwan, and South Korea are accelerating adoption with local semiconductor assembly and test, LED, power module, and electronics manufacturing customers. Their advantages lie in service responsiveness, cost control, application validation support, and supply chain security. Because these materials typically require formulation screening, dispensing process window confirmation, curing profile matching, die shear testing, damp-heat reliability evaluation, thermal cycling, and end-customer qualification before volume production, competition is not driven by price alone. It is a combined contest of material performance, batch stability, process support capability, and customer qualification cycle. High-end applications are expected to remain led by companies with extensive application data and global customer resources, while mid-range and regional scenarios will continue to create substitution opportunities for local suppliers.

The long-term demand trend is clear. Semiconductor packaging is expanding from

traditional consumer electronics into new energy vehicles, industrial control, energy conversion, AI servers, data centers, communication infrastructure, and high-reliability optoelectronic devices. This expansion is transforming die attach materials from ordinary bonding consumables into part of the package thermal path and reliability design. Power devices place particularly high requirements on thermal interfaces. SiC, GaN, IGBT, MOSFET, laser diode, and high-brightness LED devices face higher heat flux density and more severe thermal cycling, requiring thermally conductive epoxy die attach adhesives to balance thermal conductivity, low stress, low moisture absorption, and manufacturability. At the same time, packaging capacity is highly concentrated in Asia Pacific, where the regional manufacturing ecosystem is complete and customer validation and volume ramp-up can proceed quickly. This will continue to support demand in China, Japan, South Korea, Taiwan, and Southeast Asia. As automotive electronics and industrial power electronics impose stricter long-term reliability requirements, material suppliers will further enhance product value through high-thermal-conductivity filler hybridization, resin toughening, low-temperature rapid curing, low-ionic control, and automated dispensing compatibility.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thermally Conductive Epoxy Die Attach and breaks down the forecast by Thermally Conductive Filler System, 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 Thermally Conductive Epoxy Die Attach.

This report presents a comprehensive overview, market shares, and growth opportunities of Thermally Conductive Epoxy Die Attach market by product type, application, key manufacturers and key regions and countries.

Segmentation by Thermally Conductive Filler System:

Silver-Filled Thermally Conductive Epoxy Die Attach Adhesive

Aluminum Nitride-Filled Thermally Conductive Epoxy Die Attach Adhesive

Alumina-Filled Thermally Conductive Epoxy Die Attach Adhesive

Diamond-Filled Thermally Conductive Epoxy Die Attach Adhesive

Composite Ceramic-Filled Thermally Conductive Epoxy Die Attach Adhesive

Segmentation by Delivery Form:

Dispensing Paste Thermally Conductive Epoxy Die Attach Adhesive

Screen Printing Paste Thermally Conductive Epoxy Die Attach Adhesive

Premixed Frozen Thermally Conductive Epoxy Die Attach Adhesive

B-Stage Film Thermally Conductive Epoxy Die Attach Adhesive

Segmentation by Curing Process:

Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Fast Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Low-Temperature Heat-Curing Thermally Conductive Epoxy Die Attach Adhesive

Other

Segmentation by Die Attach Process:

Dispensing-Applied Thermally Conductive Epoxy Die Attach Adhesive

Pin-Transfer-Applied Thermally Conductive Epoxy Die Attach Adhesive

Screen-Printing-Applied Thermally Conductive Epoxy Die Attach Adhesive

Wafer-Backside-Coated Thermally Conductive Epoxy Die Attach Adhesive

Segmentation by Application:

Power Semiconductor Packaging

Automotive Power Device Packaging

LED and Laser Diode Packaging

Optoelectronic Device Packaging

High-Performance Computing Chip Packaging

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.

Henkel AG & Co. KGaA

NAMICS Corporation

Meridian Adhesives Group

Master Bond Inc.

DELO Industrial Adhesives

Dr. H?nle AG

Polytec PT GmbH Polymere Technologien

Nan Pao Resins Chemical Co., Ltd.

Darbond Technology Co., Ltd.

KCC Corporation

Tanaka Precious Metals

Qnity Electronics

AI Technology, Inc.

Creative Materials Inc.

Vitrochem Technology

LIPOLY

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thermally Conductive Epoxy Die Attach

market?

What factors are driving Thermally Conductive Epoxy Die Attach market growth, globally and by region?

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

How do Thermally Conductive Epoxy Die Attach market opportunities vary by end market size?

How does Thermally Conductive Epoxy Die Attach break out by Thermally Conductive Filler System, by Application?

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