

Global Wafer-Level Underfill Film Market Growth 2026-2032

<https://marketpublishers.com/r/G903D00BDC22EN.html>

Date: October 2026

Pages: 95

Price: US\$ 3,660.00 (Single User License)

ID: G903D00BDC22EN

Abstracts

The global Wafer-Level Underfill Film market size is predicted to grow from US\$ 411 million in 2025 to US\$ 1389 million in 2032; it is expected to grow at a CAGR of 19.1% from 2026 to 2032.

In 2025, global Wafer-Level Underfill Film production reached approximately 494,118 sqm, with an average global market price of around USD 850 per sqm.

The gross profit margin of major companies in the industry is between 29.64%–53.28%.

In 2025, the global production capacity of Wafer-Level Underfill Film was approximately 650,155 sqm.

Wafer-Level Underfill Film is an advanced semiconductor packaging material supplied as a thin adhesive film applied at wafer level to fill gaps, protect interconnects and improve mechanical reliability after chip bonding. It supports fine-pitch bump structures, fan-out packaging, flip-chip packaging, wafer-level packaging and heterogeneous integration. The film provides stress relief, moisture resistance, adhesion and thermal stability while enabling more uniform underfill compared with capillary flow materials. The market includes wafer-applied underfill films and related non-conductive adhesive films, but excludes liquid underfill, molding compounds and general adhesive tapes.

The industry chain includes epoxy resins, acrylic resins, fillers, curing agents, adhesion promoters, release films, carrier films, solvents, coating equipment and cleanroom packaging materials. Midstream production covers formulation, mixing, coating, drying, lamination, thickness control, clean slitting, inspection, stability testing and packaging. Downstream demand comes from advanced packaging, flip-chip assembly, fan-out

wafer-level packaging, AI chips, mobile processors, high-bandwidth memory and semiconductor assembly facilities. Growth is driven by finer interconnect pitch, larger packages, heterogeneous integration, high-reliability packaging and advanced wafer-level processes.

United States market for Wafer-Level Underfill Film is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Wafer-Level Underfill Film is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Wafer-Level Underfill Film is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Wafer-Level Underfill Film players cover Henkel AG & Co. KGaA, NAMICS Corporation, AI Technology, Inc., Resonac Corporation, YINCAE Advanced Materials, LLC, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Wafer-Level Underfill Film 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 Wafer-Level Underfill Film.

This report presents a comprehensive overview, market shares, and growth opportunities of Wafer-Level Underfill Film market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Epoxy Underfill Films

Acrylic Underfill Films

Hybrid Resin Underfill Films

Segmentation by Application Process:

Pre-Applied Underfill Films

Lamination Underfill Films

Dicing-Compatible Underfill Films

Segmentation by Film Thickness:

Thin Film??25 ?m?

Medium Film?26–50 ?m?

Thick Film??50 ?m?

Segmentation by Application:

Flip Chip Packaging

Fan-Out Wafer-Level Packaging

2.5D and 3D Packaging

Other

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

AI Technology, Inc.

Resonac Corporation

YINCAE Advanced Materials, LLC

Nopion Co., Ltd.

WaferChem Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Wafer-Level Underfill Film market?

What factors are driving Wafer-Level Underfill Film market growth, globally and by region?

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

How do Wafer-Level Underfill Film market opportunities vary by end market size?

How does Wafer-Level Underfill Film break out by Type, by Application?

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