

# Global Warpage Control Materials for Advanced Packaging Market Growth 2026-2032

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## Abstracts

The global Warpage Control Materials for Advanced Packaging market size is predicted to grow from US\$ 1514 million in 2025 to US\$ 2274 million in 2032; it is expected to grow at a CAGR of 4.9% from 2026 to 2032.

Warpage control materials for advanced packaging are functional packaging materials used in fan-out wafer-level packaging, panel-level packaging, flip-chip packaging, 2.5D and 3D heterogeneous integration, power modules, and high-density module packaging. Their core purpose is to suppress package warpage, die shift, cracking, delamination, voiding, and interconnect fatigue during wafer thinning, reconstitution molding, chip interconnection, molding curing, redistribution, and board-level assembly through the coordinated design of coefficient of thermal expansion, glass transition temperature, elastic modulus, curing shrinkage, filler particle size, flowability, adhesion strength, and clean debonding performance. These materials typically include low-warpage epoxy molding compounds, liquid molding compounds, molded underfills, capillary underfills, sheet encapsulation films, temporary bonding and debonding adhesives, low-thermal-expansion substrate-related resin materials, and board-level reinforcement adhesives. They can serve as packaging protection and structural support materials, as well as temporary support materials for thin-wafer handling and heterogeneous integration. Typical customers include OSATs, advanced packaging divisions of wafer fabs, IDMs, power module manufacturers, substrate manufacturers, and electronic materials integrators.

The strategic value of warpage control materials for advanced packaging is shifting from single-purpose auxiliary materials to a core variable of package structural reliability. As die size increases, package thickness declines, the number of heterogeneous chips grows, and redistribution structures become more complex, thermomechanical stress

risers significantly during high-temperature curing, cooling, wafer thinning, carrier release, and board-level assembly. Conventional packaging materials mainly need to provide insulation, moisture resistance, and mechanical protection, while advanced packaging materials must balance low thermal expansion, low shrinkage, high flowability, low modulus, strong adhesion, high heat resistance, and low ionic contamination. The competitiveness of materials suppliers no longer depends only on resin and filler formulation, but also on systematic understanding of package structure, die size, molding method, curing profile, carrier release, and reliability qualification. Future high-end product value will increasingly come from process co-development capability and customer qualification barriers. Suppliers that can provide integrated materials portfolios for FOWLP, FOPLP, flip-chip, 2.5D, and 3D stacking will be better positioned to enter long-term core customer platforms.

On the demand side, AI chips, high-bandwidth memory, Chiplet architectures, automotive-grade power devices, high-frequency communication modules, and high-density SiP are jointly increasing the application intensity of warpage control materials. Advanced packaging is not only an upgrade of chip interconnection methods, but also a simultaneous increase in package area, material layers, heat-source distribution, and interface count. Any minor warpage, voiding, cracking, or interface mismatch may be amplified into yield and reliability issues. Therefore, low-warpage EMC, liquid molding compounds, molded underfills, capillary underfills, sheet encapsulation films, and temporary bonding materials will form combined applications across different process steps. FOWLP and FOPLP place greater emphasis on uniform large-area molding of reconstituted wafers or panels. Flip-chip and high-performance computing packages focus more on fine-pitch interconnect protection. Power modules emphasize high thermal conductivity, high heat resistance, and thermal cycling reliability. As advanced packaging capacity expands and customer qualification standards rise, demand for these materials will become more customized, serialized, and high-end.

On the supply side, warpage control materials for advanced packaging show clear regional clustering and technical stratification. Japanese companies have deep experience in epoxy molding compounds, underfills, sheet encapsulation materials, and temporary bonding materials. Korean companies have scalable supply capabilities in semiconductor packaging EMC and electronic materials systems. U.S. and German companies have strengths in underfills, temporary support materials, UV-curable encapsulation adhesives, and high-reliability electronic adhesives. Suppliers in mainland China and Taiwan are accelerating substitution in epoxy molding compounds, liquid molding compounds, and advanced packaging support materials. Entry barriers in this industry come not only from formulation development, but also from particle-size

control, metal-ion control, volatile control, batch consistency, joint qualification with packaging customers, and long-term reliability databases. Future competition will follow two main paths: international suppliers maintaining advantages through high-end products and customer lock-in, and local suppliers gradually expanding share under packaging capacity migration and supply-chain security demand.

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

This Insight Report provides a comprehensive analysis of the global Warpage Control Materials for Advanced Packaging 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 Warpage Control Materials for Advanced Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Warpage Control Materials for Advanced Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Warpage Control Materials for Advanced Packaging and breaks down the forecast by Material Form, 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 Warpage Control Materials for Advanced Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Warpage Control Materials for Advanced Packaging market by product type, application, key manufacturers and key regions and countries.

## **Segmentation by Material Form:**

Solid

Liquid

Sheet

Tape

Paste

## **Segmentation by Resin System:**

Epoxy Resin

Polyimide

Acrylic Resin

Silicone Resin

Composite Resin

## **Segmentation by Packaging Process:**

Transfer Molding

Compression Molding

Liquid Compression Molding

Others

## **Segmentation by Application:**

Wafer Thinning Support

Wafer Reconstitution Packaging

Chip Interconnect Reinforcement

Others

## **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.

Resonac Corporation

Sumitomo Bakelite Co., Ltd.

Shin-Etsu Chemical Co., Ltd.

Panasonic Industry Co., Ltd.

KYOCERA Corporation

NAMICS Corporation

Nagase ChemteX Corporation

Toray Industries, Inc.

Tokyo Ohka Kogyo Co., Ltd.

Nitto Denko Corporation

Furukawa Electric Co., Ltd.

Samsung SDI Co., Ltd.

KCC Corporation

Jiangsu HHCK Advanced Materials Co., Ltd.

SCIENCHEM

Chang Chun Group

Eternal Materials Co., Ltd.

Henkel AG & Co. KGaA

DELO Industrial Adhesives GmbH & Co. KGaA

Brewer Science, Inc.

3M Company

MacDermid Alpha Electronics Solutions

Master Bond Inc.

Epoxy Technology, Inc.

H.B. Fuller Company

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Warpage Control Materials for Advanced Packaging market?

What factors are driving Warpage Control Materials for Advanced Packaging market growth, globally and by region?

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

How do Warpage Control Materials for Advanced Packaging market opportunities vary by end market size?

How does Warpage Control Materials for Advanced Packaging break out by Material Form, by Application?

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