

Electronic Underfill Material Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Electronic Underfill Material Market Overview

The Electronic Underfill Material Market is poised for significant growth from 2025 to 2030, driven by the increasing demand for advanced packaging solutions in the electronics industry. Underfill materials are critical in enhancing the reliability and performance of semiconductor devices, particularly in applications such as Ball Grid Array (BGA) and Chip Scale Packaging (CSP). The market is expected to grow at a CAGR of 6.8% during the forecast period, reaching a valuation of \$1.2 billion by 2030.

Market Size and Growth

In 2025, the global electronic underfill material market is projected to be valued at \$850 million. The market is anticipated to grow at a steady pace, with a CAGR of 6.8%, reaching \$1.2 billion by 2030. This growth is attributed to the increasing adoption of advanced packaging technologies in consumer electronics, automotive, and industrial applications.

Market Share & Trends Analysis

By Product Type

Capillary Underfill Material (CUF): CUF holds the largest market share, accounting for 45% of the total market in 2025. It is widely used due to its excellent flow properties and ability to fill small gaps in semiconductor packages.

No Flow Underfill Material (NUF): NUF is expected to grow at a CAGR of 7.2%, driven by its application in high-density interconnects and flip-chip packaging.

Molded Underfill Material (MUF): MUF is projected to witness the fastest growth, with a CAGR of 8.5%, owing to its use in advanced packaging solutions such as fan-out wafer-level packaging (FOWLP).

By Key Players

The market is highly competitive, with key players such as Henkel, Namics, Panasonic, Resonac, Nagase, H.B. Fuller, AIM Metals and Alloys, Epoxy Technology, and Yincae Advanced Material dominating the landscape. Henkel leads the market with a 25% share, followed by Panasonic at 18%.

By Process

The market is segmented by process into dispensing, molding, and others. Dispensing is the most widely used process, accounting for 60% of the market share in 2025, due to its precision and efficiency in applying underfill materials.

By Application

Ball Grid Array (BGA): BGA applications dominate the market, holding a 50% share in 2025. The demand for BGA packaging is driven by its use in high-performance computing and telecommunications.

Chip Scale Packaging (CSP): CSP is expected to grow at a CAGR of 7.5%, fueled by the increasing adoption of miniaturized electronic devices.

By End-Use

The market is segmented by end-use into consumer electronics, automotive, industrial, and others. Consumer electronics account for the largest share, at 40%, driven by the proliferation of smartphones, tablets, and wearables. The automotive sector is expected to grow at a CAGR of 8.0%, owing to the increasing use of electronic components in vehicles.

By Region

Asia-Pacific: The largest market, accounting for 55% of the global share in 2025, driven by the presence of major electronics manufacturers in China, South Korea, and Japan.

North America: Expected to grow at a CAGR of 6.5%, supported by advancements in semiconductor technology and the presence of key players.

Europe: Projected to grow at a CAGR of 6.0%, driven by the automotive and industrial

sectors.

Rest of the World: Expected to witness moderate growth, with a CAGR of 5.5%.

Market News on Policy and Companies

Recent developments in the electronic underfill material market include:

Henkel announced a new line of underfill materials designed for high-performance computing applications, expected to boost its market share by 5% by 2026.

Panasonic has invested \$50 million in expanding its underfill material production capacity to meet the growing demand from the automotive sector.

Governments in Asia-Pacific are implementing policies to support the semiconductor industry, which is expected to drive the demand for underfill materials in the region.

Segment Forecasts, 2025 - 2030

The electronic underfill material market is expected to witness significant growth across all segments:

Capillary Underfill Material (CUF): Projected to grow at a CAGR of 6.5%, reaching \$540 million by 2030.

No Flow Underfill Material (NUF): Expected to grow at a CAGR of 7.2%, reaching \$300 million by 2030.

Molded Underfill Material (MUF): Anticipated to grow at a CAGR of 8.5%, reaching \$360 million by 2030.

In conclusion, the electronic underfill material market is set for robust growth from 2025 to 2030, driven by advancements in semiconductor packaging technologies and increasing demand from various end-use industries. Key players are focusing on innovation and capacity expansion to capitalize on the growing market opportunities.

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