

2.5D & 3D IC Packaging Market Forecasts to 2034 – Global Analysis By Packaging Technology (2.5D IC Packaging, 3D IC Packaging, Fan-Out 3D Packaging, and Monolithic 3D IC Integration), Interconnect Technology, Material, Application, End User and By Geography

<https://marketpublishers.com/r/217E6C937568EN.html>

Date: July 2026

Pages: 0

Price: US\$ 4,150.00 (Single User License)

ID: 217E6C937568EN

Abstracts

According to Statistics MRC, the Global 2.5D & 3D IC Packaging Market is accounted for \$12.4 billion in 2026 and is expected to reach \$33.0 billion by 2034, growing at a CAGR of 13.0% during the forecast period. 2.5D and 3D IC packaging refers to advanced semiconductor packaging technologies that vertically stack multiple chips or chiplets in a single package, enabling higher integration density, improved performance, reduced power consumption, and smaller form factors compared to traditional packaging approaches. These packaging technologies encompass 2.5D IC packaging, 3D IC packaging, fan-out 3D packaging, and monolithic 3D IC integration, utilizing interconnect technologies including through-silicon via, hybrid bonding, micro-bump interconnect, copper-to-copper bonding, redistribution layer, and through-glass via.

Market Dynamics:

Driver:

Increasing demand for high-performance computing and AI processors

The growing demand for high-performance computing capabilities and AI processors serves as a primary catalyst for the 2.5D and 3D IC packaging market. AI workloads require massive computational power with high-bandwidth memory access, driving the

need for advanced packaging solutions that enable dense integration of compute and memory. HPC applications demand improved performance, power efficiency, and bandwidth that advanced 3D packaging enables through vertical stacking of chips. The increasing complexity of semiconductor devices and the limitations of traditional scaling create demand for advanced packaging as a path to continued performance improvement. As computing requirements continue to grow, the demand for 2.5D and 3D IC packaging solutions continues to accelerate.

Restraint:

High manufacturing costs and technical complexity

The 2.5D and 3D IC packaging market faces significant challenges from high manufacturing costs and technical complexity that can limit adoption and scalability. Advanced packaging requires sophisticated manufacturing processes, specialized equipment, and complex design methodologies. The development of TSV technology, hybrid bonding, and other advanced interconnect approaches involves substantial investment in research and development. Additionally, the thermal management challenges of stacked die configurations require careful design and materials selection. These cost and complexity factors can limit advanced packaging adoption to high-value applications where the performance benefits justify the additional expense.

Opportunity:

Growth of heterogeneous integration and chiplet architectures

The expansion of heterogeneous integration and the increasing adoption of chiplet architectures present significant opportunities for 2.5D and 3D IC packaging providers. Heterogeneous integration enables the combination of chiplets fabricated with different process technologies, optimizing performance and cost for specific functions. The chiplet approach leverages advanced packaging to integrate multiple die in a single package, enabling modular design and improved yield. The growing ecosystem of chiplet-based designs creates demand for advanced packaging solutions that support diverse integration requirements. As heterogeneous integration and chiplets gain adoption, the demand for 2.5D and 3D IC packaging solutions continues to grow.

Threat:

Competition from monolithic integration and emerging technologies

The 2.5D and 3D IC packaging market faces threats from competition from monolithic integration approaches and emerging technologies that could limit the need for advanced packaging in some applications. Continued advances in process technology could reduce the need for packaging-based integration in certain applications. Additionally, emerging technologies including new memory architectures and compute approaches could change system integration requirements. The development of alternative packaging technologies could provide competition for established approaches. These competitive pressures require packaging technology providers to demonstrate clear advantages in performance, cost, and time-to-market.

Covid-19 Impact:

The COVID-19 pandemic significantly impacted the 2.5D and 3D IC packaging market by accelerating demand for high-performance computing, AI, and data center infrastructure while disrupting semiconductor supply chains and manufacturing operations. The shift toward remote work and digital services increased demand for advanced computing capabilities, driving interest in advanced packaging solutions. Supply chain disruptions affected specialized materials and manufacturing capacity. The semiconductor industry's focus on performance scaling through advanced packaging continued despite pandemic challenges. As digital transformation accelerated, the focus on 2.5D and 3D IC packaging for performance and integration intensified.

The 2.5D IC packaging segment is expected to be the largest during the forecast period

The 2.5D IC packaging segment is expected to account for the largest market share during the forecast period, driven by its established maturity, proven reliability, and widespread adoption for high-performance applications including AI processors, HPC, and high-bandwidth memory integration. 2.5D packaging enables the integration of multiple chips on a silicon interposer, providing high-bandwidth connectivity between components. The manufacturing infrastructure and ecosystem for 2.5D packaging are well-established, supporting continued adoption. As the most mature advanced packaging approach, 2.5D IC packaging maintains the largest market share across various high-performance applications.

The 3D IC packaging segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the 3D IC packaging segment is predicted to witness the highest growth rate, driven by its superior integration density, potential for heterogeneous integration, and ability to address the performance and power requirements of next-generation AI, HPC, and memory applications through vertical stacking. 3D packaging enables shorter interconnect distances, reduced power consumption, and improved bandwidth compared to 2.5D approaches. The development of advanced bonding technologies and increased manufacturing capacity supports 3D adoption. As performance requirements become more demanding, the adoption of 3D IC packaging continues to accelerate.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by the concentration of semiconductor manufacturing and packaging capacity, presence of leading foundries and OSAT providers, significant investment in advanced packaging technologies, and strong demand from electronics manufacturing across countries like Taiwan, South Korea, China, Japan, and Singapore. The region's dominance in semiconductor packaging supports market leadership. Major foundries and OSAT companies in Asia Pacific are at the forefront of 2.5D and 3D IC packaging development and deployment. Additionally, the concentration of electronics manufacturing and semiconductor fabrication contributes to the region's largest market share.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is also anticipated to exhibit the highest CAGR, reinforcing its market leadership through continued investment in advanced packaging capabilities and semiconductor manufacturing expansion. The growth is fueled by increasing demand for advanced packaging in AI, HPC, and high-bandwidth memory applications across Asia Pacific countries. Taiwan's foundry and packaging leadership, South Korea's memory manufacturing expertise, and China's investment in semiconductor capabilities support regional growth. The rapid expansion of advanced packaging capacity and increasing focus on heterogeneous integration across the region accelerates 2.5D and 3D IC packaging adoption at the fastest pace.

Key players in the market

Some of the key players in 2.5D & 3D IC Packaging Market include Taiwan Semiconductor Manufacturing Company, Samsung Electronics Co. Ltd., Intel

Corporation, ASE Technology Holding Co. Ltd., Amkor Technology Inc., JCET Group Co. Ltd., Powertech Technology Inc. (PTI), ChipMOS Technologies Inc., Tongfu Microelectronics Co. Ltd., SPIL, IBM Corporation, Broadcom Inc., SK hynix Inc., Micron Technology Inc., and Tokyo Electron Limited.

Key Developments:

In March 2025, TSMC announced its next-generation 3D IC packaging technology featuring improved integration density and thermal performance for AI and HPC applications. The technology enables advanced heterogeneous integration for demanding computing applications.

In February 2025, Samsung Electronics introduced an advanced 2.5D packaging solution for high-bandwidth memory integration in AI processors. The solution delivers improved performance and power efficiency for next-generation computing applications.

Packaging Technologies Covered:

2.5D IC Packaging

3D IC Packaging

Fan-Out 3D Packaging

Monolithic 3D IC Integration

Interconnect Technologies Covered:

Through-Silicon Via (TSV)

Hybrid Bonding

Micro-Bump Interconnect

Copper-to-Copper (Cu-Cu) Bonding

Redistribution Layer (RDL)

Through-Glass Via (TGV)

Materials Covered:

Silicon

Organic Substrates

Glass

Copper

Dielectric Materials

Underfill Materials

Adhesives & Encapsulation Materials

Applications Covered:

High-Performance Computing (HPC)

Artificial Intelligence (AI) Processors

Graphics Processing Units (GPUs)

High-Bandwidth Memory (HBM)

CPUs & SoCs

Networking & Data Center Devices

Consumer Electronics

Automotive Electronics

Telecommunications

Industrial Electronics

Aerospace & Defense

Medical Electronics

End Users Covered:

Integrated Device Manufacturers (IDMs)

Foundries

Outsourced Semiconductor Assembly and Test (OSAT) Providers

Fabless Semiconductor Companies

Electronics Manufacturing Service (EMS) Providers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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