

Semiconductor Packaging Adhesives Market Forecasts to 2034 - Global Analysis By Adhesive Type (Epoxy Adhesives, Polyurethane Adhesives, Acrylic Adhesives, Silicone Adhesives and Other Adhesive Types), Packaging Type, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Semiconductor Packaging Adhesives Market is accounted for \$1.6 billion in 2026 and is expected to reach \$2.8 billion by 2034 growing at a CAGR of 7.1% during the forecast period. Semiconductor Packaging Adhesives are advanced bonding materials designed to secure, insulate, protect, and reinforce semiconductor components throughout packaging and assembly processes. They create durable connections between chips, substrates, lead frames, and related packaging structures while contributing to thermal performance and electrical stability. These materials are formulated to tolerate elevated temperatures, mechanical stresses, humidity, and chemical conditions experienced during manufacturing and device operation. Key uses include die attachment, underfilling, encapsulation, and package assembly. Semiconductor miniaturization, advanced packaging technologies, and growing demand for sophisticated electronic devices are encouraging innovation in adhesive formulations.

According to SIA, worldwide semiconductor sales reached \$120.6 billion in May 2026, increasing 104.1% compared with May 2025. The organization stated that May represented the highest-ever monthly semiconductor sales total, demonstrating continued expansion in the underlying semiconductor industry.

Market Dynamics:

Driver:**Growth in advanced semiconductor packaging**

Increasing use of advanced semiconductor packaging methods is driving demand for specialized packaging adhesives with superior performance characteristics. Technologies including chiplets, 2.5D and 3D integration, fan-out packaging, and heterogeneous integration require dependable bonding, thermal resistance, mechanical durability, and electrical insulation. Consequently, adhesive manufacturers are developing formulations that offer improved reliability, reduced stress, stronger thermal management, and compatibility with different semiconductor substrates, components, and materials used in increasingly sophisticated package structures.

Restraint:**Stringent performance and reliability requirements**

High reliability standards can constrain the adoption of semiconductor packaging adhesives because these materials must withstand elevated temperatures, mechanical loads, humidity, chemicals, and repeated thermal expansion and contraction. Maintaining stable bonding throughout these conditions requires advanced formulation and extensive validation. Manufacturers must balance adhesion strength, low-stress performance, thermal stability, and substrate compatibility during development. Consequently, complex testing, qualification procedures, material optimization, and associated costs can create challenges for suppliers entering or expanding within semiconductor packaging applications.

Opportunity:**Increasing demand for high-performance electronics**

Growing adoption of high-performance electronics in artificial intelligence, data centers, automotive applications, telecommunications, and consumer products is creating opportunities for semiconductor packaging adhesive suppliers. More powerful processors generate increased thermal and mechanical demands, strengthening the need for dependable packaging materials. Manufacturers can address these requirements through adhesives offering better thermal management, electrical insulation, low outgassing, temperature resistance, and extended durability. Increasing package complexity is also supporting demand for customized solutions designed for particular applications.

Threat:

Rapid changes in semiconductor packaging technologies

Fast technological development in semiconductor packaging can pose challenges to adhesive suppliers as emerging processes may require new material characteristics. Technologies such as hybrid bonding, wafer-level packaging, glass substrates, and highly integrated package structures can alter the role of conventional adhesives. Manufacturers need ongoing investment in research, formulation improvements, testing, and qualification to support changing production methods. Consequently, continuous technological transformation creates uncertainty for suppliers regarding the future requirements, relevance, and demand for particular semiconductor packaging adhesive formulations.

Covid-19 Impact:

COVID-19 significantly affected the Semiconductor Packaging Adhesives Market through disruptions in semiconductor production, logistics, raw material availability, and manufacturing activities. Temporary plant closures and labor restrictions slowed output and postponed packaging operations. Transportation challenges further affected supplies of specialized chemicals, polymers, and adhesive components. At the same time, increased use of laptops, smartphones, communication equipment, data centers, and other electronic products maintained semiconductor demand. With factories reopening, semiconductor capacity expansion and adoption of advanced packaging technologies supported market recovery.

The epoxy adhesives segment is expected to be the largest during the forecast period

The epoxy adhesives segment is expected to account for the largest market share during the forecast period because they offer strong adhesion, thermal resistance, chemical stability, and mechanical strength required for semiconductor packaging. They effectively bond semiconductor dies with substrates, lead frames, and other package components while maintaining structural integrity. Their formulations can provide controlled curing, low shrinkage, electrical insulation, and resistance to environmental conditions. Their combination of versatility, durability, and dependable performance makes them an important bonding solution throughout semiconductor manufacturing and advanced packaging operations.

The sensors segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the sensors segment is predicted to witness the highest growth rate as sensing technologies become increasingly integrated into automotive, industrial, healthcare, consumer, and connected electronic applications. Sensor packaging requires dependable adhesives capable of supporting component bonding, environmental protection, thermal performance, and mechanical durability. Greater adoption of compact sensing components in advanced electronic systems is creating demand for specialized packaging materials. Developments in MEMS, wearable electronics, automotive sensors, and IoT devices are further encouraging the use of adhesive solutions suited to miniature packages requiring consistent performance and reliability.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, supported by its strong semiconductor manufacturing, packaging, assembly, and electronics industries. Countries including China, Taiwan, South Korea, Japan, and Southeast Asia maintain significant production capabilities and packaging operations, generating substantial requirements for specialized bonding materials. Well-developed supply networks, continued semiconductor capacity expansion, and increasing electronics manufacturing reinforce regional demand. Growing production of automotive electronics, consumer devices, and advanced computing systems further contributes to adhesive utilization, strengthening Asia Pacific's position as a major hub for semiconductor packaging solutions.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by increasing semiconductor production, advanced packaging development, and electronics manufacturing. Taiwan, South Korea, China, Japan, and Southeast Asian economies provide established semiconductor ecosystems that support adhesive demand. Expanding investments in chip fabrication and sophisticated packaging technologies are increasing requirements for die-attach, bonding, underfill, and encapsulation materials. Rising applications in AI, high-performance computing, automotive electronics, and consumer technology are reinforcing regional demand, while expanding packaging infrastructure and supply networks support continued

market development.

Key players in the market

Some of the key players in Semiconductor Packaging Adhesives Market include Henkel, Heraeus, Dow, H.B. Fuller, Master Bond, Panacol-Elosol, Epoxy Technology, DELO, Polytec PT, Wuxi DK Electronic, Shin-Etsu Chemical, 3M, NAMICS Corporation, Resonac, MacDermid Alpha, ThreeBond, Parker LORD and Nagase ChemteX.

Key Developments:

In March 2026, Henkel AG has agreed buy Olaplex Holdings Inc., the hair-care brand that developed a cult following for its shampoos and other treatments, in a \$1.4 billion deal. Dusseldorf, Germany-based Henkel will pay \$2.06 a share for Olaplex.

In October 2025, Dow and MEGlobal have finalized an agreement for Dow to supply an additional equivalent to 100 KTA of ethylene from its Gulf Coast operations. The ethylene will serve as a key feedstock for MEGlobal's ethylene glycol (EG) manufacturing facility co-located at Dow's and MEGlobal's Oyster Creek site.

In June 2025, Resonac Corporation and PulseForge, Inc. are pleased to announce a strategic partnership to advance and promote photonic debonding technology for next-generation semiconductor packaging. This collaboration aims to drive the adoption of photonic debonding into high-volume manufacturing, offering a high-throughput, low-stress, and industry's best cost-effective solution for temporary bonding and debonding of ultra-thin wafers.

Adhesive Types Covered:

Epoxy Adhesives

Polyurethane Adhesives

Acrylic Adhesives

Silicone Adhesives

Other Adhesive Types

Packaging Types Covered:

Flip-Chip Packaging

Wafer-Level Packaging

Die-Attach Packaging

Encapsulation & Underfill

Applications Covered:

Logic ICs

Memory Devices

Discrete Devices

Optoelectronics

Sensors

Other Applications

End Users Covered:

Consumer Electronics

Automotive Electronics

Industrial Electronics

Healthcare & Medical Devices

Telecommunications

Aerospace & Defense

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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