

# **Electronic Packaging Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material (Plastic, Metal, Glass, and others), By Packaging Technology (Through-Hole Mounting, Surface-Mount Technology [SMD] and Chip-Scale Packages [CSP]), By End User (Consumer Electronics, Aerospace & Defense, Automotive, Telecommunication, and others), By Region & Competition, 2019-2029F**

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## **Abstracts**

Global Electronic Packaging Market was valued at USD 1.02 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 18.01% through 2029. The Electronic Packaging market involves the design, development, and production of protective enclosures for electronic devices and components. This market is essential for ensuring the functionality, reliability, and longevity of electronics by safeguarding them from environmental hazards, mechanical stress, and electromagnetic interference. Key products in this market include semiconductor packaging, printed circuit board (PCB) assemblies, and microelectromechanical systems (MEMS) packaging. Electronic packaging encompasses various levels, from the packaging of individual semiconductor chips (such as integrated circuits) to the assembly of entire electronic systems. It involves different techniques and materials, such as ceramic, plastic, and metal, to provide appropriate thermal management, electrical connectivity, and physical protection. The market serves a wide range of industries, including consumer electronics, automotive, aerospace, healthcare, and telecommunications.

## Key Market Drivers

### Insatiable Demand for Increased Computational Power and Energy Efficiency:

The primary driving forces behind the remarkable expansion of the Global Electronic Packaging Market is the insatiable demand for increased computational power and energy efficiency. In today's digital age, where electronic devices have become integral to our personal and professional lives, there is a constant quest for solutions that can deliver higher processing speeds while minimizing power consumption.

Electronic Packaging technology stands at the forefront of addressing this crucial need. It employs advanced semiconductor manufacturing processes that significantly enhance both performance and energy efficiency. By optimizing the arrangement of electronic components and connections within a package, Electronic Packaging technology reduces power losses, enhances thermal management, and enables efficient power distribution. This empowers electronic devices to execute more complex tasks with reduced power consumption, making Electronic Packaging indispensable for a wide spectrum of applications, ranging from smartphones and laptops to data centers and high-performance computing systems.

In an era where energy efficiency and sustainability are paramount, Electronic Packaging technology plays a pivotal role in meeting these goals. Its capacity to enhance computational power while conserving energy resources contributes to the overall efficiency and sustainability of electronic systems, aligning with the growing emphasis on environmental responsibility.

### Pushing Technological Boundaries and Integration:

The another significant driver propelling the growth of the Global Electronic Packaging Market is the relentless pursuit of technological advancement and integration. Industries across the board are striving to push the boundaries of innovation, leading to a surging demand for semiconductor devices capable of delivering advanced performance and integration.

Electronic Packaging technology plays an instrumental role in meeting this demand. It excels in producing smaller and more integrated electronic components, thereby enabling the design of innovative, compact, and high-performance electronic devices. This ability to reduce the form factor of electronic components while enhancing their functionality positions Electronic Packaging as an essential enabler for various

applications across industries.

Applications span a wide spectrum, from artificial intelligence and machine learning to autonomous vehicles and the Internet of Things (IoT). The semiconductor industry heavily relies on Electronic Packaging technology to design smaller, faster, and more power-efficient devices. In AI and machine learning, it supports high-performance computing systems that are vital for data processing and analytics. In the automotive sector, Electronic Packaging technology underpins the development of advanced sensor systems and communication devices, contributing to the safety and capabilities of autonomous vehicles. In the IoT realm, it allows for the creation of compact, low-power devices, fostering the proliferation of smart homes, wearables, and industrial IoT solutions.

#### Security and Data Integrity in an Interconnected World:

Security and data integrity have assumed paramount importance in today's interconnected global landscape. With the increasing interconnectivity of devices and the exchange of sensitive data, safeguarding information and protecting against cyber threats have become critical imperatives.

Electronic Packaging technology addresses these challenges by playing a pivotal role in enhancing the security features of semiconductor devices. It offers advanced capabilities such as secure enclaves, tamper resistance, and hardware-based encryption. These security features are indispensable for safeguarding sensitive data, protecting against cyber threats, and ensuring the reliability and trustworthiness of digital solutions.

In applications like mobile payments, secure communication, and critical infrastructure, Electronic Packaging technology is indispensable. It fortifies the protection of financial transactions, secures sensitive communications, and ensures the integrity of critical systems. As cybersecurity threats continue to evolve, Electronic Packaging technology remains at the forefront of ensuring the resilience of electronic devices and systems in an increasingly interconnected world.

#### Key Market Challenges

##### Thermal Management and Heat Dissipation:

One of the foremost challenges in the Global Electronic Packaging Market is effective

thermal management and heat dissipation. As electronic devices continue to evolve and pack more functionality into smaller form factors, they generate higher levels of heat due to increased power densities. Efficiently dissipating this heat is crucial for maintaining device performance, reliability, and longevity.

Electronic Packaging plays a critical role in heat management by providing the structural framework for components and interconnections. However, as electronic components become more powerful and densely integrated, the challenge of ensuring they operate within safe temperature limits becomes more complex.

Inadequate thermal management can lead to overheating, which not only degrades the performance of electronic components but also poses a risk of permanent damage or failure. To address this challenge, Electronic Packaging solutions must incorporate advanced thermal materials, heat sinks, and cooling mechanisms. Innovations in materials, such as high-thermal-conductivity substrates and thermal interface materials, are essential to efficiently dissipate heat. Additionally, novel cooling techniques, such as liquid cooling and phase-change materials, are being explored to improve thermal management in Electronic Packaging.

Thermal challenges are exacerbated in applications like high-performance computing, data centers, and power electronics, where electronic components are subjected to heavy workloads. Balancing performance with temperature control is a constant struggle, and effective thermal management remains a significant challenge in the Global Electronic Packaging Market.

#### Miniaturization and Integration Complexities:

The ongoing trend of miniaturization and increased integration of electronic components is a double-edged sword in the Global Electronic Packaging Market. While the drive toward smaller, more compact devices has led to significant advancements, it has also introduced complexities and challenges in Electronic Packaging.

Manufacturers and designers are continually challenged to shrink the footprint of electronic devices while maintaining or enhancing their performance. As electronic components become smaller and more densely packed, Electronic Packaging solutions must accommodate these components and interconnections within limited physical space. This necessitates the development of advanced packaging techniques, materials, and interconnect technologies that can handle the increased complexity. Moreover, miniaturization presents challenges related to signal integrity, power

distribution, and thermal management. As components are placed closer together, the risk of electromagnetic interference (EMI) and crosstalk increases. Ensuring the integrity of electrical signals and power delivery while mitigating interference becomes a critical challenge.

While miniaturization drives innovation and allows for the development of sleek, portable devices, it requires continuous efforts to overcome the complexities of integrating electronic components in compact spaces. Electronic Packaging technologies must evolve to address these challenges, offering solutions that balance miniaturization with efficient and reliable performance.

## Key Market Trends

### Advanced Materials for Enhanced Performance and Miniaturization:

The prominent trends in the Global Electronic Packaging Market is the continuous exploration and adoption of advanced materials to achieve enhanced performance and miniaturization. Electronic packaging has evolved from traditional materials to advanced solutions that offer improved electrical, thermal, and mechanical properties.

The demand for smaller, lighter, and more powerful electronic devices has driven the development of materials with higher thermal conductivity, improved dielectric properties, and superior mechanical strength. For instance, advanced substrate materials like silicon carbide (SiC) and gallium nitride (GaN) are gaining traction due to their excellent thermal conductivity, enabling efficient heat dissipation in high-power applications such as power electronics and RF devices.

The integration of organic and inorganic materials, known as hybrid packaging, is emerging as a trend. This approach combines the benefits of different materials to optimize performance and enable miniaturization. For example, organic substrates offer flexibility and cost-effectiveness, while inorganic materials provide superior thermal and electrical properties. By combining these materials, electronic packaging can achieve a balance between performance, reliability, and size reduction.

The adoption of 3D packaging technologies, including through-silicon vias (TSVs) and chip stacking, is another trend in pursuit of miniaturization. These techniques enable the stacking of multiple chips within a single package, reducing the footprint of electronic devices. As electronic packaging materials and technologies continue to evolve, the trend towards advanced materials remains pivotal for meeting the demands of modern

electronics.

#### IoT-Driven Packaging Solutions for Connectivity and Miniaturization:

The Internet of Things (IoT) has ushered in a new era of connectivity and smart devices, and this trend is significantly impacting the Global Electronic Packaging Market. As more devices are connected to the IoT ecosystem, there is a growing need for packaging solutions that support connectivity, miniaturization, and reliability.

Electronic Packaging is instrumental in enabling the miniaturization of IoT devices, which are often small, battery-powered, and required to operate reliably for extended periods. These devices need packaging solutions that provide compact form factors, efficient heat dissipation, and protection from environmental factors.

Wafer-level packaging (WLP) is a key trend in IoT-driven electronic packaging. WLP allows semiconductor devices to be packaged at the wafer level, reducing the package size and cost. This is particularly important for IoT sensors and microcontrollers, which must fit within constrained spaces. Moreover, the demand for RF and wireless communication in IoT devices has led to the development of packaging solutions that support high-frequency signals. Advanced RF packaging technologies, such as system-in-package (SiP) and module-level integration, are becoming more prevalent to accommodate the connectivity requirements of IoT devices.

Environmental considerations play a role in IoT-driven packaging solutions. As many IoT devices are deployed in remote and harsh environments, electronic packaging must provide protection against moisture, dust, and temperature variations. This trend towards IoT-driven packaging solutions underscores the importance of connectivity, miniaturization, and robustness in the Global Electronic Packaging Market.

#### Sustainability and Circular Economy Initiatives:

A significant trend in the Global Electronic Packaging Market is the growing emphasis on sustainability and circular economy initiatives. The electronics industry is increasingly aware of its environmental impact and is actively seeking ways to reduce waste, energy consumption, and the use of hazardous materials.

One aspect of this trend involves the development and adoption of eco-friendly materials for electronic packaging. Lead-free soldering materials, bio-based plastics, and recyclable packaging components are gaining traction as alternatives to traditional



materials with environmental concerns. Furthermore, electronic packaging manufacturers are reevaluating their production processes to minimize waste and energy consumption. Lean manufacturing and sustainable practices are being integrated into packaging facilities to reduce the environmental footprint.

Circular economy principles are being applied to electronic packaging, with a focus on reducing electronic waste (e-waste). Design for disassembly and recycling is becoming more common, allowing for easier separation of components at the end of a device's life cycle. This not only reduces e-waste but also promotes the reuse of valuable materials and components. The trend towards sustainability in electronic packaging extends to regulations and certifications. Compliance with environmental standards, such as Restriction of Hazardous Substances (RoHS) and Waste Electrical and Electronic Equipment (WEEE) directives, is crucial. Industry certifications for sustainable practices and materials are also on the rise.

Sustainability and circular economy initiatives are reshaping the Global Electronic Packaging Market, encouraging responsible practices and the development of environmentally friendly packaging solutions. As environmental concerns continue to gain prominence, this trend is expected to play a pivotal role in shaping the future of electronic packaging.

## Segmental Insights

### Material Insights

The Plastic segment held the largest market segment in 2023. The electronic packaging market in the plastic segment is experiencing significant growth, driven by a confluence of factors that underscore its increasing importance in the electronics industry. One of the primary drivers is the cost efficiency that plastic materials offer. Compared to traditional materials like metal or ceramic, plastics are considerably cheaper and facilitate cost-effective manufacturing processes. This reduction in production costs makes plastics an attractive option for companies looking to maximize profitability. Furthermore, plastics are lightweight yet durable, which is crucial for the packaging of portable and consumer electronics. The reduced weight not only lowers shipping costs but also enhances the convenience of handling and transportation, which is essential in the global supply chain.

Design flexibility is another compelling driver for the adoption of plastics in electronic packaging. The versatility of plastic materials allows for innovative and complex design

options, accommodating the evolving design requirements of modern electronic devices. This flexibility supports the miniaturization trend in electronics, enabling the creation of compact and efficient packaging solutions that are increasingly demanded in the market. Additionally, the advanced thermal and electrical insulation properties of plastics are critical for protecting sensitive electronic components, ensuring their reliability and longevity by preventing overheating and electrical interference.

Environmental sustainability is also playing a pivotal role in driving the plastic segment of electronic packaging. With heightened environmental awareness and stricter regulations, there has been a surge in the development of biodegradable and recyclable plastics. These sustainable materials not only comply with regulatory standards but also appeal to eco-conscious consumers, thus driving market demand. Technological advancements in polymer science and manufacturing technologies have further expanded the application scope of plastics. Innovations such as conductive plastics, high-temperature-resistant plastics, and flame-retardant materials are meeting the rigorous demands of electronic packaging and opening up new possibilities for their use.

## Regional Insights

Asia Pacific held the largest market share in 2023. The Asia Pacific region is witnessing robust growth in the electronic packaging market, driven by several key factors that underscore its expanding significance. A primary driver is the rapid economic growth in emerging economies such as China, India, and Southeast Asian countries. These nations are experiencing a surge in disposable incomes, which, coupled with urbanization, is fueling a burgeoning consumer electronics market. As more people acquire smartphones, tablets, laptops, and other electronic devices, the demand for efficient and cost-effective packaging solutions increases correspondingly. This surge in consumer electronics is directly translating to higher demand for electronic packaging in the region.

Another significant driver is the strong presence of leading electronics manufacturers and OEMs (Original Equipment Manufacturers) in the Asia Pacific. Countries like China, South Korea, Japan, and Taiwan are home to some of the world's largest electronics companies, such as Samsung, Sony, and Foxconn. These companies not only dominate the global electronics market but also drive the demand for advanced packaging solutions. The region's manufacturing capabilities are further bolstered by robust infrastructure and a well-established supply chain network, which facilitate the large-scale production of electronic components and devices, necessitating efficient



packaging solutions to ensure product integrity and safety during transportation and storage.

Technological advancements and innovation in packaging materials and techniques are also pivotal drivers in the Asia Pacific electronic packaging market. The region is at the forefront of developing new packaging technologies that cater to the evolving needs of modern electronic devices. Innovations such as flexible packaging, advanced barrier materials, and eco-friendly packaging solutions are gaining traction. These technological advancements not only enhance the functionality and durability of electronic packaging but also cater to the increasing environmental consciousness among consumers and regulatory bodies, which is particularly relevant in Asia Pacific where governments are implementing stricter environmental regulations.

### Key Market Players

Amkor Technology, Inc.

ASE Technology Holding Co. Ltd

Intel Corporation

Samsung Electronics Co., Ltd.

Taiwan Semiconductor Manufacturing Company Ltd

KYOCERA Corporation

Powertech Technology Inc.

Shinko Electric Industries Co., Ltd.

Amtech Systems, Inc.

JCET Group Inc.

### Report Scope:

In this report, the Global Electronic Packaging Market has been segmented into the

*Electronic Packaging Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Mat...*

following categories, in addition to the industry trends which have also been detailed below:

Electronic Packaging Market, By Material:

Plastic

Metal

Glass

others

Electronic Packaging Market, By Packaging Technology:

Through-Hole Mounting

Surface-Mount Technology [SMD]

Chip-Scale Packages [CSP]

Electronic Packaging Market, By End User:

Consumer Electronics

Aerospace & Defense

Automotive

Telecommunication

others

Electronic Packaging Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

South America

Brazil

Argentina

Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electronic Packaging Market.

## Available Customizations:

Global Electronic Packaging market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
  - 2.5.1. Secondary Research
  - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
  - 2.6.1. The Bottom-Up Approach
  - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
  - 2.8.1. Data Triangulation & Validation

### **3. EXECUTIVE SUMMARY**

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL ELECTRONIC PACKAGING MARKET OVERVIEW**

### **6. GLOBAL ELECTRONIC PACKAGING MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Material (Plastic, Metal, Glass, and others)
  - 6.2.2. By Packaging Technology (Through-Hole Mounting, Surface-Mount Technology

[SMD] and Chip-Scale Packages [CSP])

6.2.3. By End User (Consumer Electronics, Aerospace & Defense, Automotive, Telecommunication, and others)

6.2.4. By Region (North America, Europe, South America, Middle East & Africa, Asia Pacific)

6.3. By Company (2023)

6.4. Market Map

## **7. NORTH AMERICA ELECTRONIC PACKAGING MARKET OUTLOOK**

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Material

7.2.2. By Packaging Technology

7.2.3. By End User

7.2.4. By Country

7.3. North America: Country Analysis

7.3.1. United States Electronic Packaging Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Material

7.3.1.2.2. By Packaging Technology

7.3.1.2.3. By End User

7.3.2. Canada Electronic Packaging Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Material

7.3.2.2.2. By Packaging Technology

7.3.2.2.3. By End User

7.3.3. Mexico Electronic Packaging Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Material

7.3.3.2.2. By Packaging Technology

7.3.3.2.3. By End User



## **8. EUROPE ELECTRONIC PACKAGING MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Material

#### 8.2.2. By Packaging Technology

#### 8.2.3. By End User

#### 8.2.4. By Country

### 8.3. Europe: Country Analysis

#### 8.3.1. Germany Electronic Packaging Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Material

###### 8.3.1.2.2. By Packaging Technology

###### 8.3.1.2.3. By End User

#### 8.3.2. France Electronic Packaging Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Material

###### 8.3.2.2.2. By Packaging Technology

###### 8.3.2.2.3. By End User

#### 8.3.3. United Kingdom Electronic Packaging Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Material

###### 8.3.3.2.2. By Packaging Technology

###### 8.3.3.2.3. By End User

#### 8.3.4. Italy Electronic Packaging Market Outlook

##### 8.3.4.1. Market Size & Forecast

###### 8.3.4.1.1. By Value

##### 8.3.4.2. Market Share & Forecast

###### 8.3.4.2.1. By Material

###### 8.3.4.2.2. By Packaging Technology

###### 8.3.4.2.3. By End User

### 8.3.5. Spain Electronic Packaging Market Outlook

#### 8.3.5.1. Market Size & Forecast

##### 8.3.5.1.1. By Value

#### 8.3.5.2. Market Share & Forecast

##### 8.3.5.2.1. By Material

##### 8.3.5.2.2. By Packaging Technology

##### 8.3.5.2.3. By End User

### 8.3.6. Belgium Electronic Packaging Market Outlook

#### 8.3.6.1. Market Size & Forecast

##### 8.3.6.1.1. By Value

#### 8.3.6.2. Market Share & Forecast

##### 8.3.6.2.1. By Material

##### 8.3.6.2.2. By Packaging Technology

##### 8.3.6.2.3. By End User

## **9. SOUTH AMERICA ELECTRONIC PACKAGING MARKET OUTLOOK**

### 9.1. Market Size & Forecast

#### 9.1.1. By Value

### 9.2. Market Share & Forecast

#### 9.2.1. By Material

#### 9.2.2. By Packaging Technology

#### 9.2.3. By End User

#### 9.2.4. By Country

### 9.3. South America: Country Analysis

#### 9.3.1. Brazil Electronic Packaging Market Outlook

##### 9.3.1.1. Market Size & Forecast

##### 9.3.1.1.1. By Value

##### 9.3.1.2. Market Share & Forecast

##### 9.3.1.2.1. By Material

##### 9.3.1.2.2. By Packaging Technology

##### 9.3.1.2.3. By End User

#### 9.3.2. Colombia Electronic Packaging Market Outlook

##### 9.3.2.1. Market Size & Forecast

##### 9.3.2.1.1. By Value

##### 9.3.2.2. Market Share & Forecast

##### 9.3.2.2.1. By Material

##### 9.3.2.2.2. By Packaging Technology

##### 9.3.2.2.3. By End User

### 9.3.3. Argentina Electronic Packaging Market Outlook

#### 9.3.3.1. Market Size & Forecast

##### 9.3.3.1.1. By Value

#### 9.3.3.2. Market Share & Forecast

##### 9.3.3.2.1. By Material

##### 9.3.3.2.2. By Packaging Technology

##### 9.3.3.2.3. By End User

### 9.3.4. Chile Electronic Packaging Market Outlook

#### 9.3.4.1. Market Size & Forecast

##### 9.3.4.1.1. By Value

#### 9.3.4.2. Market Share & Forecast

##### 9.3.4.2.1. By Material

##### 9.3.4.2.2. By Packaging Technology

##### 9.3.4.2.3. By End User

### 9.3.5. Peru Electronic Packaging Market Outlook

#### 9.3.5.1. Market Size & Forecast

##### 9.3.5.1.1. By Value

#### 9.3.5.2. Market Share & Forecast

##### 9.3.5.2.1. By Material

##### 9.3.5.2.2. By Packaging Technology

##### 9.3.5.2.3. By End User

## **10. MIDDLE EAST & AFRICA ELECTRONIC PACKAGING MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Material

#### 10.2.2. By Packaging Technology

#### 10.2.3. By End User

#### 10.2.4. By Country

### 10.3. Middle East & Africa: Country Analysis

#### 10.3.1. Saudi Arabia Electronic Packaging Market Outlook

##### 10.3.1.1. Market Size & Forecast

##### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

##### 10.3.1.2.1. By Material

##### 10.3.1.2.2. By Packaging Technology

##### 10.3.1.2.3. By End User

- 10.3.2. UAE Electronic Packaging Market Outlook
  - 10.3.2.1. Market Size & Forecast
    - 10.3.2.1.1. By Value
  - 10.3.2.2. Market Share & Forecast
    - 10.3.2.2.1. By Material
    - 10.3.2.2.2. By Packaging Technology
    - 10.3.2.2.3. By End User
- 10.3.3. South Africa Electronic Packaging Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Material
    - 10.3.3.2.2. By Packaging Technology
    - 10.3.3.2.3. By End User
- 10.3.4. Turkey Electronic Packaging Market Outlook
  - 10.3.4.1. Market Size & Forecast
    - 10.3.4.1.1. By Value
  - 10.3.4.2. Market Share & Forecast
    - 10.3.4.2.1. By Material
    - 10.3.4.2.2. By Packaging Technology
    - 10.3.4.2.3. By End User
- 10.3.5. Israel Electronic Packaging Market Outlook
  - 10.3.5.1. Market Size & Forecast
    - 10.3.5.1.1. By Value
  - 10.3.5.2. Market Share & Forecast
    - 10.3.5.2.1. By Material
    - 10.3.5.2.2. By Packaging Technology
    - 10.3.5.2.3. By End User

## **11. ASIA PACIFIC ELECTRONIC PACKAGING MARKET OUTLOOK**

- 11.1. Market Size & Forecast
  - 11.1.1. By Value
- 11.2. Market Share & Forecast
  - 11.2.1. By Material
  - 11.2.2. By Packaging Technology
  - 11.2.3. By End User
  - 11.2.4. By Country
- 11.3. Asia-Pacific: Country Analysis

- 11.3.1. China Electronic Packaging Market Outlook
  - 11.3.1.1. Market Size & Forecast
    - 11.3.1.1.1. By Value
  - 11.3.1.2. Market Share & Forecast
    - 11.3.1.2.1. By Material
    - 11.3.1.2.2. By Packaging Technology
    - 11.3.1.2.3. By End User
- 11.3.2. India Electronic Packaging Market Outlook
  - 11.3.2.1. Market Size & Forecast
    - 11.3.2.1.1. By Value
  - 11.3.2.2. Market Share & Forecast
    - 11.3.2.2.1. By Material
    - 11.3.2.2.2. By Packaging Technology
    - 11.3.2.2.3. By End User
- 11.3.3. Japan Electronic Packaging Market Outlook
  - 11.3.3.1. Market Size & Forecast
    - 11.3.3.1.1. By Value
  - 11.3.3.2. Market Share & Forecast
    - 11.3.3.2.1. By Material
    - 11.3.3.2.2. By Packaging Technology
    - 11.3.3.2.3. By End User
- 11.3.4. South Korea Electronic Packaging Market Outlook
  - 11.3.4.1. Market Size & Forecast
    - 11.3.4.1.1. By Value
  - 11.3.4.2. Market Share & Forecast
    - 11.3.4.2.1. By Material
    - 11.3.4.2.2. By Packaging Technology
    - 11.3.4.2.3. By End User
- 11.3.5. Australia Electronic Packaging Market Outlook
  - 11.3.5.1. Market Size & Forecast
    - 11.3.5.1.1. By Value
  - 11.3.5.2. Market Share & Forecast
    - 11.3.5.2.1. By Material
    - 11.3.5.2.2. By Packaging Technology
    - 11.3.5.2.3. By End User
- 11.3.6. Indonesia Electronic Packaging Market Outlook
  - 11.3.6.1. Market Size & Forecast
    - 11.3.6.1.1. By Value
  - 11.3.6.2. Market Share & Forecast

- 11.3.6.2.1. By Material
- 11.3.6.2.2. By Packaging Technology
- 11.3.6.2.3. By End User
- 11.3.7. Vietnam Electronic Packaging Market Outlook
  - 11.3.7.1. Market Size & Forecast
    - 11.3.7.1.1. By Value
  - 11.3.7.2. Market Share & Forecast
    - 11.3.7.2.1. By Material
    - 11.3.7.2.2. By Packaging Technology
    - 11.3.7.2.3. By End User

## **12. MARKET DYNAMICS**

- 12.1. Drivers
- 12.2. Challenges

## **13. MARKET TRENDS AND DEVELOPMENTS**

## **14. COMPANY PROFILES**

- 14.1. Amkor Technology, Inc.
  - 14.1.1. Business Overview
  - 14.1.2. Key Revenue and Financials
  - 14.1.3. Recent Developments
  - 14.1.4. Key Personnel/Key Contact Person
  - 14.1.5. Key Product/Services Offered
- 14.2. ASE Technology Holding Co. Ltd
  - 14.2.1. Business Overview
  - 14.2.2. Key Revenue and Financials
  - 14.2.3. Recent Developments
  - 14.2.4. Key Personnel/Key Contact Person
  - 14.2.5. Key Product/Services Offered
- 14.3. Intel Corporation
  - 14.3.1. Business Overview
  - 14.3.2. Key Revenue and Financials
  - 14.3.3. Recent Developments
  - 14.3.4. Key Personnel/Key Contact Person
  - 14.3.5. Key Product/Services Offered
- 14.4. Samsung Electronics Co., Ltd.



- 14.4.1. Business Overview
- 14.4.2. Key Revenue and Financials
- 14.4.3. Recent Developments
- 14.4.4. Key Personnel/Key Contact Person
- 14.4.5. Key Product/Services Offered
- 14.5. Taiwan Semiconductor Manufacturing Company Ltd
  - 14.5.1. Business Overview
  - 14.5.2. Key Revenue and Financials
  - 14.5.3. Recent Developments
  - 14.5.4. Key Personnel/Key Contact Person
  - 14.5.5. Key Product/Services Offered
- 14.6. KYOCERA Corporation
  - 14.6.1. Business Overview
  - 14.6.2. Key Revenue and Financials
  - 14.6.3. Recent Developments
  - 14.6.4. Key Personnel/Key Contact Person
  - 14.6.5. Key Product/Services Offered
- 14.7. Powertech Technology Inc.
  - 14.7.1. Business Overview
  - 14.7.2. Key Revenue and Financials
  - 14.7.3. Recent Developments
  - 14.7.4. Key Personnel/Key Contact Person
  - 14.7.5. Key Product/Services Offered
- 14.8. Shinko Electric Industries Co., Ltd.
  - 14.8.1. Business Overview
  - 14.8.2. Key Revenue and Financials
  - 14.8.3. Recent Developments
  - 14.8.4. Key Personnel/Key Contact Person
  - 14.8.5. Key Product/Services Offered
- 14.9. Amtech Systems, Inc.
  - 14.9.1. Business Overview
  - 14.9.2. Key Revenue and Financials
  - 14.9.3. Recent Developments
  - 14.9.4. Key Personnel/Key Contact Person
  - 14.9.5. Key Product/Services Offered
- 14.10. JCET Group Inc.
  - 14.10.1. Business Overview
  - 14.10.2. Key Revenue and Financials
  - 14.10.3. Recent Developments

14.10.4. Key Personnel/Key Contact Person

14.10.5. Key Product/Services Offered

## **15. STRATEGIC RECOMMENDATIONS**

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