

Semiconductor & IC Packaging Materials Market by Type (Organic substrate, Bonding wires, Leadframes, Encapsulation resins, Ceramic packages, Die attach materials, Solder balls), Packaging Technology, End-use industry, and Region - Global Forecast to 2029

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Report description:

The Semiconductor & IC packaging materials Market is projected to reach USD 70.9 billion by 2029, at a CAGR of 10.1% from USD 43.9 billion in 2024. The semiconductor and IC packaging materials market experiences dynamic growth fueled by various pivotal factors. Firstly, there is a rising demand for advanced packaging solutions due to continuous technological advancements in semiconductor devices. This demand is further boosted by the expanding market for consumer electronics and IoT devices, which require efficient and innovative packaging materials. Additionally, the industry witnesses a surge in the need for compact and lightweight packaging solutions, aligning with the trend of miniaturization in electronics. Moreover, the emergence of new applications such as autonomous vehicles and the implementation of 5G technology contribute significantly to the market's evolution. These new applications require sophisticated packaging materials to meet the stringent performance and reliability standards. Furthermore, the semiconductor industry's expansion in regions like Asia Pacific plays a crucial role in driving market growth. The region's strategic position as a global manufacturing hub, combined with government support and investment incentives, further propels the demand for semiconductor and IC packaging materials. In essence, the interplay of these factors drives the continuous growth and evolution of the semiconductor and IC packaging materials market, shaping its trajectory in response to evolving technological and industry trends.

"Bonding wire, by type, accounts for the second-largest market share in 2023."

Bonding wire is the second-largest type segment for semiconductor and IC packaging materials due to several key factors. Firstly, bonding wires play a crucial role in connecting semiconductor devices to their package leads or pads, forming electrical connections essential for device functionality. This critical function makes bonding wires a fundamental component in

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semiconductor packaging. Secondly, advancements in semiconductor technology, such as the miniaturization of semiconductor devices and the shift towards higher-density packaging, have increased the demand for fine-pitch bonding wires capable of handling intricate bonding configurations. This trend has driven the adoption of advanced bonding wire materials with improved electrical conductivity, thermal stability, and mechanical strength to meet the evolving requirements of modern semiconductor packaging. Additionally, bonding wires offer cost-effective solutions compared to other interconnection technologies like flip-chip bonding or wire bonding alternatives, making them a preferred choice for many semiconductor manufacturers, particularly in applications where cost considerations are significant. Furthermore, the versatility of bonding wires allows for compatibility with various packaging techniques, such as ball bonding and wedge bonding, providing flexibility in design and manufacturing processes. Overall, the combination of essential functionality, technological advancements, cost-effectiveness, and versatility positions bonding wires as a significant segment in the semiconductor and IC packaging materials market.

"Consumer electronics is expected to be the fastest growing end use industry segment at CAGR 10.3% for semiconductor & IC packaging materials market during the forecast period, in terms of value."

Consumer electronics is the fastest-growing end-use industry for semiconductor and IC packaging materials due to several key factors. Firstly, the rapid pace of technological innovation in the consumer electronics sector drives continuous demand for advanced semiconductor devices with enhanced performance, functionality, and miniaturization. This demand, in turn, fuels the need for cutting-edge packaging materials capable of meeting the stringent requirements of modern electronic devices. Secondly, the growing adoption of emerging technologies such as artificial intelligence (AI), internet of things (IoT), augmented reality (AR), and virtual reality (VR) in consumer electronics contributes significantly to the increased demand for semiconductor and IC packaging materials. These technologies rely heavily on high-performance semiconductor components that require efficient and reliable packaging solutions to function optimally. Additionally, the expanding global market for consumer electronics, fueled by rising disposable incomes, urbanization, and digitalization trends, further drives the growth of the semiconductor and IC packaging materials market. The proliferation of smartphones, tablets, laptops, wearables, smart home devices, and automotive electronics amplifies the demand for packaging materials across a wide range of consumer electronic products.

"Based on region, North America was the second largest market for semiconductor & IC packaging materials market in 2023."

North America is the second-largest region after Asia Pacific for the semiconductor and IC packaging materials market due to several key factors. Firstly, North America is home to a significant number of leading semiconductor companies, research institutions, and technology hubs, particularly in regions like Silicon Valley in California. This concentration of industry expertise and innovation drives demand for high-quality packaging materials to support cutting-edge semiconductor technologies and applications. Secondly, North America boasts a robust consumer electronics market with a high adoption rate of advanced electronic devices such as smartphones, tablets, laptops, and IoT gadgets. This demand for consumer electronics fuels the need for efficient and reliable semiconductor packaging materials to ensure optimal performance and functionality of these devices. Additionally, North America is at the forefront of technological advancements in areas like artificial intelligence (AI), machine learning, 5G technology, and autonomous vehicles, all of which rely heavily on semiconductor and IC packaging materials. The region's strong focus on innovation and investment in emerging technologies contribute to the growth of the semiconductor packaging materials market. Furthermore, North America has a well-established manufacturing infrastructure and supply chain network for semiconductor and electronics industries, supporting efficient production and distribution of packaging materials. The presence of major semiconductor foundries, packaging and testing facilities, equipment suppliers, and research centers enhances the region's competitiveness in the global semiconductor packaging materials market.

Moreover, strategic partnerships, collaborations, and government initiatives aimed at promoting technological innovation and industry growth further bolster North America's position as a key player in the semiconductor and IC packaging materials market, making it the second-largest region after Asia Pacific.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

-□By Company Type: Tier 1 - 50%, Tier 2 - 25%, and Tier 3 - 25%

-□By Designation: C-Level - 25%, Director Level - 15%, and Others - 60%

-□By Region: North America - 30%, Europe -20%, Asia Pacific - 35%, Middle East & Africa - 10%, and South America- 5%

The key players in this market are LG Chem Ltd. (South Korea), Jiangsu Changjian Technology Co., Ltd. (China), Henkel AG & Co.

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KGaA (Germany), Kyocera Corporation (Japan), ASE (Taiwan), Siliconware Precision Industries Co., Ltd. (Taiwan), Amkor Technology (US), Texas Instruments (US), IBIDEN CO., LTD. (Japan), Powertech Technology Inc. (Taiwan) etc.

Research Coverage

This report segments the market for the semiconductor & IC packaging materials market on the basis of type, packaging technology, end-use industry and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisitions associated with the market for the semiconductor & IC packaging materials market.

Key benefits of buying this report

This research report is focused on various levels of analysis ? industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the semiconductor & IC packaging materials market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers: The market growth is driven by increasing demand from consumer electronics industry, growing miniaturization and densification in the electronic sector and adoption of emerging technologies like 5G and autonomous vehicles.
- Market Penetration: Comprehensive information on the semiconductor & IC packaging materials market offered by top players in the global semiconductor & IC packaging materials market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the semiconductor & IC packaging materials market.
- Market Development: Comprehensive information about lucrative emerging markets ? the report analyzes the markets for the semiconductor & IC packaging materials market across regions.
- Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global semiconductor & IC packaging materials market.
- Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the semiconductor & IC packaging materials market.

Table of Contents:

1□INTRODUCTION□	23
1.1□STUDY OBJECTIVES□	23
1.2□MARKET DEFINITION□	23
1.3□INCLUSIONS & EXCLUSIONS□	24
1.4□MARKET SCOPE□	25
FIGURE 1□SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET SEGMENTATION□	25
1.4.1□REGIONS COVERED□	25
1.4.2□YEARS CONSIDERED□	26
1.5□CURRENCY CONSIDERED□	26
1.6□LIMITATIONS□	26
1.7□STAKEHOLDERS□	27
1.8□SUMMARY OF CHANGES□	27
2□RESEARCH METHODOLOGY□	28
2.1□RESEARCH DATA□	28
FIGURE 2□SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: RESEARCH DESIGN□	28
2.1.1□SECONDARY DATA□	29
2.1.2□PRIMARY DATA□	29
2.1.2.1□Primary data sources□	29

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2.1.2.2	Primary interviews - Top semiconductor & IC packaging material manufacturers	30
2.1.2.3	Breakdown of primary interviews	30
2.1.2.4	Key industry insights	30
2.2	BASE NUMBER CALCULATION	31
2.2.1	SUPPLY-SIDE APPROACH	31
2.2.2	DEMAND-SIDE APPROACH	31
2.3	FORECAST NUMBER CALCULATION	31
2.3.1	SUPPLY SIDE	31
2.3.2	DEMAND SIDE	32
2.4	MARKET SIZE ESTIMATION	32
FIGURE 3	MARKET SIZE ESTIMATION METHODOLOGY: REVENUE OF MARKET PLAYERS	32
2.4.1	BOTTOM-UP APPROACH	33
2.4.2	TOP-DOWN APPROACH	33
2.5	DATA TRIANGULATION	34
FIGURE 4	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: DATA TRIANGULATION	34
2.6	RESEARCH ASSUMPTIONS	35
2.7	IMPACT OF RECESSION	35
2.8	GROWTH FORECAST	36
2.9	RISK ASSESSMENT	36
3	EXECUTIVE SUMMARY	37
FIGURE 5	ORGANIC SUBSTRATE TYPE SEGMENT TO DOMINATE MARKET BETWEEN 2024 AND 2029	37
FIGURE 6	CONSUMER ELECTRONICS END-USE INDUSTRY TO LEAD MARKET BETWEEN 2024 AND 2029	38
FIGURE 7	SOP PACKAGING TECHNOLOGY TO LEAD MARKET BETWEEN 2024 AND 2029	39
FIGURE 8	ASIA PACIFIC TO DOMINATE MARKET DURING FORECAST PERIOD	40
4	PREMIUM INSIGHTS	41
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	41
FIGURE 9	GROWING DEMAND FROM AUTOMOTIVE AND IT & TELECOMMUNICATION SECTORS TO DRIVE MARKET	41
4.2	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE	42
FIGURE 10	ORGANIC SUBSTRATES TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	42
FIGURE 11	CONSUMER ELECTRONICS TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	42
FIGURE 12	SOP TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD	43
4.3	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY	43
FIGURE 13	INDIA TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD	43
5	MARKET OVERVIEW	44
5.1	INTRODUCTION	44
5.2	MARKET DYNAMICS	45
FIGURE 14	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	45
5.2.1	DRIVERS	45
5.2.1.1	Increasing demand from consumer electronics market	45
5.2.1.2	Growing miniaturization and densification in electronics sector	46
5.2.1.3	Adoption of emerging technologies like 5G and autonomous vehicles	47
5.2.2	RESTRAINTS	48
5.2.2.1	IP concerns in semiconductor industry during outsourcing and testing processes	48
5.2.2.2	Technological change and obsolescence	48
5.2.3	OPPORTUNITIES	49
5.2.3.1	Integration with advanced technologies	49

5.2.3.2	Need for customization and specialization in electronics industry	49
5.2.4	CHALLENGES	50
5.2.4.1	High cost of advanced materials	50
5.2.4.2	Stringent regulations and sustainability factor	51
	?	
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	51
5.3.1	REVENUE SHIFT AND NEW REVENUE POCKETS FOR SEMICONDUCTOR & IC PACKAGING MATERIAL MANUFACTURERS	51
FIGURE 15	REVENUE SHIFT OF SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	52
5.4	VALUE CHAIN ANALYSIS	52
FIGURE 16	OVERVIEW OF SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET VALUE CHAIN	53
5.4.1	RAW MATERIAL SUPPLIERS	53
5.4.2	MANUFACTURING	53
5.4.3	DISTRIBUTION AND LOGISTICS	54
5.4.4	END USERS	54
5.5	INVESTMENT AND FUNDING	54
FIGURE 17	INVESTMENT AND FUNDING SCENARIO: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	54
5.6	PRICING ANALYSIS	55
5.6.1	AVERAGE SELLING PRICE TREND OF CERAMIC PACKAGES, BY REGION	55
TABLE 1	AVERAGE SELLING PRICE OF CERAMIC PACKAGES, BY REGION, 2020-2029 (USD/PIECE)	55
FIGURE 18	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: AVERAGE SELLING PRICE TREND OF CERAMIC PACKAGES, BY REGION	55
5.6.2	AVERAGE SELLING PRICE TREND OF ENCAPSULATION RESINS, BY REGION	56
TABLE 2	AVERAGE SELLING PRICE OF ENCAPSULATION RESINS, BY REGION, 2020-2029 (USD/KG)	56
FIGURE 19	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: AVERAGE SELLING PRICE TREND OF ENCAPSULATION RESINS, BY REGION	56
5.6.3	AVERAGE SELLING PRICE TREND OF LEADFRAMES, BY REGION	57
TABLE 3	AVERAGE SELLING PRICE OF LEADFRAMES, BY REGION, 2020-2029 (USD/PIECE)	57
FIGURE 20	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: AVERAGE SELLING PRICE TREND OF LEADFRAMES, BY REGION	57
5.6.4	AVERAGE SELLING PRICE TREND OF SOLDER BALLS, BY REGION	57
TABLE 4	AVERAGE SELLING PRICE OF SOLDER BALLS, BY REGION, 2020-2029 (USD/BALL)	57
FIGURE 21	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: AVERAGE SELLING PRICE TREND OF SOLDER BALLS, BY REGION	58
5.7	ECOSYSTEM MAP	58
TABLE 5	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: ECOSYSTEM	58
5.8	TECHNOLOGY ANALYSIS	59
TABLE 6	TECHNOLOGIES OFFERED IN SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	60
5.9	PATENT ANALYSIS	61
5.9.1	METHODOLOGY	61
5.9.2	PATENTS GRANTED WORLDWIDE, 2014-2023	61
TABLE 7	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: TOTAL NUMBER OF PATENTS	61
5.9.3	PATENT PUBLICATION TRENDS	62
FIGURE 22	NUMBER OF PATENTS GRANTED (2014?2023)	62
5.9.4	INSIGHTS	62
5.9.5	LEGAL STATUS OF PATENTS	63
FIGURE 23	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: LEGAL STATUS OF PATENTS	63
5.9.6	JURISDICTION ANALYSIS	63

FIGURE 24	PATENTS ANALYSIS FOR SEMICONDUCTOR & IC PACKAGING MATERIALS, BY JURISDICTION, 2014-2023	63
5.9.7	TOP COMPANIES/APPLICANTS	64
FIGURE 25	TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENTS IN LAST 10 YEARS	64
TABLE 8	LIST OF MAJOR PATENT OWNERS FOR SEMICONDUCTOR & IC PACKAGING MATERIALS	64
5.9.8	LIST OF MAJOR PATENTS	65
TABLE 9	MAJOR PATENTS FOR SEMICONDUCTOR & IC PACKAGING MATERIALS	65
5.10	TRADE ANALYSIS	66
5.10.1	IMPORT SCENARIO	66
FIGURE 26	IMPORTS OF SEMICONDUCTOR & IC PACKAGING MATERIALS, BY COUNTRY, 2020-2023 (USD THOUSAND)	66
5.10.2	EXPORT SCENARIO	67
FIGURE 27	EXPORTS OF SEMICONDUCTOR & IC PACKAGING MATERIALS, BY COUNTRY, 2020-2023 (USD THOUSAND)	67
5.11	KEY CONFERENCES & EVENTS, 2024-2025	67
TABLE 10	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: DETAILED LIST OF CONFERENCES AND EVENTS	67
5.12	REGULATORY LANDSCAPE	68
5.12.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	68
TABLE 11	NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	68
TABLE 12	EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	69
TABLE 13	ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	70
TABLE 14	MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	71
TABLE 15	SOUTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	72
5.12.2	REGULATIONS RELATED TO SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	73
TABLE 16	LIST OF REGULATIONS FOR SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	73
5.13	PORTER'S FIVE FORCES ANALYSIS	73
TABLE 17	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: PORTER'S FIVE FORCES ANALYSIS	73
FIGURE 28	PORTER'S FIVE FORCES ANALYSIS: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET	74
5.13.1	THREAT OF SUBSTITUTES	74
5.13.2	THREAT OF NEW ENTRANTS	75
5.13.3	BARGAINING POWER OF SUPPLIERS	75
5.13.4	BARGAINING POWER OF BUYERS	76
5.13.5	INTENSITY OF COMPETITIVE RIVALRY	76
5.14	KEY STAKEHOLDERS AND BUYING CRITERIA	77
5.14.1	KEY STAKEHOLDERS IN BUYING PROCESS	77
FIGURE 29	INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS	77
TABLE 18	INFLUENCE OF INSTITUTIONAL BUYERS ON BUYING PROCESS FOR TOP THREE APPLICATIONS	77
5.14.2	BUYING CRITERIA	77
FIGURE 30	KEY BUYING CRITERIA FOR APPLICATIONS	78
TABLE 19	KEY BUYING CRITERIA FOR APPLICATIONS	78
5.15	MACROECONOMIC INDICATORS	79
5.15.1	GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES	79
5.16	CASE STUDIES	79
5.16.1	AMKOR'S CONTRIBUTION TO ADVANCING AUTOMOTIVE SEMICONDUCTOR SOLUTIONS	79
5.16.2	BOLSTERING SEMICONDUCTOR PACKAGING IN US: IMPERATIVE OF NATIONAL ADVANCED PACKAGING MANUFACTURING PROGRAM	80
5.16.3	ADVANCING WEARABLE SENSOR TECHNOLOGY: ROLE OF MASTER BOND EP17HTDA-1 DIE ATTACH ADHESIVE IN INTEGRATING ADVANCED SENSOR COMPONENTS	81
6	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE	82
6.1	INTRODUCTION	83

FIGURE 31 ORGANIC SUBSTRATE TO BE LARGEST SEGMENT OF SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET DURING FORECAST PERIOD 83

TABLE 21 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION) 83

TABLE 22 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION) 84

6.2 ORGANIC SUBSTRATES 84

6.2.1 COMPLEX NEEDS OF MODERN ELECTRONIC SEGMENT TO DRIVE GROWTH 84

6.3 BONDING WIRES 85

6.3.1 VITAL FUNCTIONALITY AND ADVANCEMENTS IN BONDING WIRES TO DRIVE MARKET 85

6.4 LEADFRAMES 86

6.4.1 INCREASE IN NEED FOR THERMALLY EFFICIENT MATERIALS FOR SEMICONDUCTORS TO DRIVE DEMAND 86

6.5 ENCAPSULATION RESINS 86

6.5.1 SUPERIOR ELECTRICAL INSULATION, CHEMICAL RESISTANCE, AND MECHANICAL STRENGTH TO DRIVE DEMAND 86

6.6 DIE ATTACH MATERIALS 87

6.6.1 VERSATILITY IN VARIOUS DEVICES FOR MULTIPLE USES TO DRIVE DEMAND 87

6.7 CERAMIC PACKAGES 87

6.7.1 INCREASED USE OF MINIATURIZATION IN ELECTRONICS INDUSTRY TO DRIVE DEMAND 87

6.8 THERMAL INTERFACE MATERIALS 88

6.8.1 INCREASED COMPLEXITY IN ELECTRONIC PRODUCTS TO DRIVE DEMAND 88

6.9 SOLDER BALLS 88

6.9.1 DEMAND FOR COMPACT, EFFICIENT, AND HIGH-PERFORMING DEVICES TO DRIVE MARKET 88

6.10 OTHER TYPES 89

7 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY 90

7.1 INTRODUCTION 91

FIGURE 32 SOP SEGMENT TO LEAD MARKET DURING FORECAST PERIOD 91

TABLE 23 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION) 92

TABLE 24 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2024-2029 (USD MILLION) 92

7.2 SMALL OUTLINE PACKAGE (SOP) 92

7.2.1 COMPACT, LOW-PROFILE HIGH-PERFORMANCE PACKAGING SOLUTION FOR WIDE RANGE OF ELECTRONIC APPLICATIONS 92

7.3 GRID ARRAY (GA) 93

7.3.1 REDUCTION IN SIGNAL PROPAGATION DELAYS, IMPROVED SIGNAL INTEGRITY, AND ENHANCED SYSTEM PERFORMANCE TO DRIVE MARKET 93

7.4 QUAD FLAT NO-LEADS (QFN) 94

7.4.1 COMPACTNESS, THERMAL EFFICIENCY, ELECTRICAL PERFORMANCE & RELIABILITY MAKE IT PREFERRED CHOICE FOR HIGH DENSITY ELECTRONIC APPLICATIONS 94

7.5 DUAL FLAT NO-LEADS (DFN) 94

7.5.1 COMPACT, COST-EFFECTIVE, AND THERMALLY EFFICIENT SOLUTIONS FOR SPACE-CONSTRAINED ELECTRONIC APPLICATIONS 94

7.6 QUAD FLAT PACKAGES (QFP) 95

7.6.1 HIGH PIN COUNT, IMPROVED THERMAL PERFORMANCE, AND SUITABILITY FOR AUTOMATED ASSEMBLY MAKE IT PREFERRED CHOICE 95

7.7 DUAL IN-LINE (DIP) 96

7.7.1 ROBUSTNESS, SIMPLICITY, AND EASE OF APPLICATION TO DRIVE DEMAND 96

7.8 OTHER TECHNOLOGIES 97

7.8.1 CHIP SCALE PACKAGE (CSP) 97

7.8.2 WAFER LEVEL PACKAGING (WLP) 97

7.8.3 SYSTEM IN PACKAGE (SIP) 97

8 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY 98

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8.1 INTRODUCTION 99

FIGURE 33 CONSUMER ELECTRONICS TO DOMINATE MARKET DURING FORECAST PERIOD (USD MILLION) 99

TABLE 25 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 99

TABLE 26 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 100

8.2 CONSUMER ELECTRONICS 100

8.2.1 INCREASE IN DEMAND FOR ADVANCED PACKAGING SOLUTIONS TO DRIVE MARKET 100

8.3 AUTOMOTIVE 101

8.3.1 RISE IN DEMAND FOR EVS TO DRIVE MARKET FOR SEMICONDUCTOR & IC PACKAGING MATERIALS 101

8.4 HEALTHCARE 101

8.4.1 DEMAND FOR BIOCOMPATIBILITY, PRECISION, AND RELIABILITY TO DRIVE MARKET 101

8.5 IT & TELECOMMUNICATION 102

8.5.1 SEMICONDUCTOR & IC PACKAGING MATERIALS TO PLAY VITAL ROLE IN MEETING DEMANDS FOR FASTER AND MORE EFFICIENT IT & TELECOMMUNICATIONS SYSTEMS 102

8.6 AEROSPACE & DEFENSE 102

8.6.1 DEMAND FOR LIGHTWEIGHT AND HIGH-PERFORMANCE PACKAGING SOLUTIONS TO DRIVE MARKET 102

8.7 OTHER END-USE INDUSTRIES 103

9 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY REGION 104

9.1 INTRODUCTION 105

FIGURE 34 ASIA PACIFIC TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD 105

TABLE 27 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY REGION, 2020-2023 (USD MILLION) 106

TABLE 28 SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY REGION, 2024-2029 (USD MILLION) 106

9.2 ASIA PACIFIC 106

9.2.1 RECESSION IMPACT 107

FIGURE 35 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET SNAPSHOT 107

TABLE 29 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2020-2023 (USD MILLION) 108

TABLE 30 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2024-2029 (USD MILLION) 108

TABLE 31 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION) 109

TABLE 32 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION) 109

TABLE 33 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION) 110

TABLE 34 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2024-2029 (USD MILLION) 110

TABLE 35 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 111

TABLE 36 ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 111

9.2.2 CHINA 111

9.2.2.1 Push toward electric vehicles and government support for domestic semiconductor development to drive market 111

TABLE 37 CHINA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 112

TABLE 38 CHINA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 112

9.2.3 JAPAN 113

9.2.3.1 Focus on high-end technology to drive market 113

TABLE 39 JAPAN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 114

TABLE 40 JAPAN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 114

9.2.4 INDIA 114

9.2.4.1 Growing automotive and consumer electronics industry coupled with extensive government initiatives to drive market 114

TABLE 41 INDIA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 115

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TABLE 42 INDIA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 115

9.2.5 SOUTH KOREA 116

9.2.5.1 Technological prowess and thriving consumer electronics industry to drive market 116

TABLE 43 SOUTH KOREA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 116

TABLE 44 SOUTH KOREA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 116

9.2.6 TAIWAN 117

9.2.6.1 Efficient manufacturing capabilities, government support, and focus on technology and innovation to drive demand 117

TABLE 45 TAIWAN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 117

TABLE 46 TAIWAN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 118

9.2.7 REST OF ASIA PACIFIC 118

TABLE 47 REST OF ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 118

TABLE 48 REST OF ASIA PACIFIC: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 119

9.3 NORTH AMERICA 119

9.3.1 RECESSION IMPACT 119

FIGURE 36 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET SNAPSHOT 120

TABLE 49 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2020-2023 (USD MILLION) 120

TABLE 50 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2024-2029 (USD MILLION) 121

TABLE 51 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION) 121

TABLE 52 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION) 121

TABLE 53 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION) 122

TABLE 54 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2024-2029 (USD MILLION) 122

TABLE 55 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 122

TABLE 56 NORTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 123

9.3.2 US 123

9.3.2.1 Growth of automotive electronics and government initiatives to drive demand 123

TABLE 57 US: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 124

TABLE 58 US: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 124

9.3.3 CANADA 124

9.3.3.1 Focus on high-reliability solutions to drive market 124

TABLE 59 CANADA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 125

TABLE 60 CANADA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 125

9.3.4 MEXICO 125

9.3.4.1 Thriving consumer electronics and automotive manufacturing sectors to drive demand 125

TABLE 61 MEXICO: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 126

TABLE 62 MEXICO: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 126

9.4 EUROPE 127

9.4.1 RECESSION IMPACT 127

FIGURE 37 EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET SNAPSHOT 128

TABLE 63 EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2020-2023 (USD MILLION) 129

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TABLE 64	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	129
TABLE 65	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION)	130
TABLE 66	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION)	130
TABLE 67	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION)	131
TABLE 68	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2024-2029 (USD MILLION)	131
TABLE 69	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	131
TABLE 70	EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	132
9.4.2	GERMANY	132
9.4.2.1	Growth of automotive, pharmaceutical, and industrial automation sectors to drive demand	132
TABLE 71	GERMANY: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	133
TABLE 72	GERMANY: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	133
9.4.3	ITALY	133
9.4.3.1	Established manufacturing expertise along with government incentives to drive market	133
TABLE 73	ITALY: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	134
TABLE 74	ITALY: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	134
9.4.4	FRANCE	135
9.4.4.1	Growth in aerospace & defense sector to drive market	135
TABLE 75	FRANCE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	135
TABLE 76	FRANCE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	136
9.4.5	UK	136
9.4.5.1	Key focus on niche and growing end-use industries to drive demand	136
TABLE 77	UK: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	137
TABLE 78	UK: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	137
9.4.6	SPAIN	137
9.4.6.1	Manufacturing sector, along with government's focus on research & development, to drive demand	137
TABLE 79	SPAIN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	138
TABLE 80	SPAIN: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	138
9.4.7	REST OF EUROPE	138
TABLE 81	REST OF EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	139
TABLE 82	REST OF EUROPE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	139
9.5	MIDDLE EAST & AFRICA	139
9.5.1	RECESSION IMPACT	140
TABLE 83	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2020-2023 (USD MILLION)	140
TABLE 84	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2024-2029 (USD MILLION)	140
TABLE 85	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION)	141
TABLE 86	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION)	141
TABLE 87	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION)	142
TABLE 88	MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY,	

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2024-2029 (USD MILLION) 142

TABLE 89 MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 142

TABLE 90 MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 143

9.5.2 UAE 143

9.5.2.1 Commitment to strategic diversification and government initiatives to drive demand 143

TABLE 91 UAE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 144

TABLE 92 UAE: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 144

9.5.3 REST OF GCC COUNTRIES 144

TABLE 93 REST OF GCC COUNTRIES: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 145

TABLE 94 REST OF GCC COUNTRIES: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 145

9.5.4 ISRAEL 145

9.5.4.1 Prominent high-tech communication sector coupled with thriving startup ecosystem to drive demand 145

TABLE 95 ISRAEL: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 146

TABLE 96 ISRAEL: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 146

9.5.5 SOUTH AFRICA 146

9.5.5.1 Automotive electronics sector to drive demand 146

TABLE 97 SOUTH AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 147

TABLE 98 SOUTH AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 147

9.5.6 REST OF MIDDLE EAST & AFRICA 147

TABLE 99 REST OF MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 148

TABLE 100 REST OF MIDDLE EAST & AFRICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 148

9.6 SOUTH AMERICA 148

9.6.1 RECESSION IMPACT 149

TABLE 101 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2020-2023 (USD MILLION) 149

TABLE 102 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY COUNTRY, 2024-2029 (USD MILLION) 149

TABLE 103 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2020-2023 (USD MILLION) 150

TABLE 104 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY TYPE, 2024-2029 (USD MILLION) 150

TABLE 105 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2020-2023 (USD MILLION) 151

TABLE 106 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY PACKAGING TECHNOLOGY, 2024-2029 (USD MILLION) 151

TABLE 107 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 151

TABLE 108 SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION) 152

9.6.2 ARGENTINA 152

9.6.2.1 Government incentives and policies to attract foreign investment to drive demand 152

TABLE 109 ARGENTINA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION) 152

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TABLE 110	ARGENTINA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	153
9.6.3	BRAZIL	153
9.6.3.1	Thriving electronics sector along with government initiatives attracting foreign investments to support market growth	153
TABLE 111	BRAZIL: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	154
TABLE 112	BRAZIL: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	154
9.6.4	REST OF SOUTH AMERICA	154
TABLE 113	REST OF SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2020-2023 (USD MILLION)	155
TABLE 114	REST OF SOUTH AMERICA: SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, BY END-USE INDUSTRY, 2024-2029 (USD MILLION)	155
10	COMPETITIVE LANDSCAPE	156
10.1	INTRODUCTION	156
10.1.1	OVERVIEW OF STRATEGIES ADOPTED BY KEY SEMICONDUCTOR & IC PACKAGING MANUFACTURERS	156
10.2	MARKET SHARE ANALYSIS	157
10.2.1	RANKING OF KEY MARKET PLAYERS, 2022	157
FIGURE 38	RANKING OF TOP FIVE PLAYERS IN SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, 2022	157
10.2.2	MARKET SHARE OF KEY PLAYERS	158
TABLE 115	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: DEGREE OF COMPETITION	158
10.2.3	BRAND/PRODUCT COMPARATIVE ANALYSIS	159
FIGURE 39	BRAND/PRODUCT COMPARATIVE ANALYSIS, BY SEGMENTS	159
FIGURE 40	SHARE OF KEY PLAYERS IN SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET, 2022	160
10.2.3.1	Jiangsu Changjian Technology Co., Ltd.	160
10.2.3.2	Henkel AG & Co. KGaA	160
10.2.3.3	Amkor Technology	160
10.2.3.4	ASE	161
10.2.3.5	Siliconware Precision Industries Co., Ltd. (SPIL)	161
10.3	REVENUE ANALYSIS	162
FIGURE 41	REVENUE ANALYSIS OF TOP 5 PLAYERS, 2020-2024	162
10.4	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	162
10.4.1	STARS	162
10.4.2	EMERGING LEADERS	163
10.4.3	PERVASIVE PLAYERS	163
10.4.4	PARTICIPANTS	163
FIGURE 42	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: COMPANY EVALUATION MATRIX, 2023	163
10.4.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	164
TABLE 116	COMPANY TYPE FOOTPRINT (10 COMPANIES)	164
TABLE 117	COMPANY END-USE INDUSTRY FOOTPRINT (10 COMPANIES)	165
TABLE 118	COMPANY PACKAGING TECHNOLOGY FOOTPRINT (10 COMPANIES)	165
TABLE 119	COMPANY REGION FOOTPRINT (10 COMPANIES)	166
10.5	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	166
10.5.1	PROGRESSIVE COMPANIES	166
10.5.2	RESPONSIVE COMPANIES	166
10.5.3	DYNAMIC COMPANIES	167
10.5.4	STARTING BLOCKS	167
FIGURE 43	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: START-UPS/SMES EVALUATION MATRIX, 2023	167
10.5.5	COMPETITIVE BENCHMARKING	168

10.5.5.1	Detailed list of key start-ups/SMES	168
TABLE 120	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: DETAILED LIST OF KEY START-UPS/SMES	168
10.5.5.2	Competitive benchmarking of key start-ups/SMES	169
TABLE 121	START-UPS/SMES TYPE FOOTPRINT (15 COMPANIES)	169
TABLE 122	START-UPS/SMES END-USE INDUSTRY FOOTPRINT (15 COMPANIES)	170
TABLE 123	START-UPS/SMES PACKAGING TECHNOLOGY FOOTPRINT (15 COMPANIES)	171
TABLE 124	START-UPS/SMES REGION FOOTPRINT (15 COMPANIES)	172
FIGURE 44	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: OVERALL FOOTPRINT	173
10.5.6	VALUATION AND FINANCIAL METRICS OF KEY SEMICONDUCTOR & IC PACKAGING VENDORS	174
FIGURE 45	EV/EBITDA OF KEY VENDORS	174
FIGURE 46	YEAR-TO-DATE (YTD) PRICE TOTAL RETURN	174
10.6	COMPETITIVE SCENARIO AND TRENDS	175
10.6.1	PRODUCT LAUNCHES	175
TABLE 125	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: PRODUCT LAUNCHES, JANUARY 2019-FEBRUARY 2024	175
10.6.2	DEALS	177
TABLE 126	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: DEALS, JANUARY 2019-FEBRUARY 2024	177
10.6.3	EXPANSIONS	178
TABLE 127	SEMICONDUCTOR & IC PACKAGING MATERIALS MARKET: EXPANSIONS, JANUARY 2019-FEBRUARY 2024	178
11	COMPANY PROFILES	180
	(Business overview, Products offered, Recent developments & MnM View)*	
11.1	KEY PLAYERS	180
11.1.1	LG CHEM.	180
TABLE 128	LG CHEM.: COMPANY OVERVIEW	180
FIGURE 47	LG CHEM.: COMPANY SNAPSHOT	181
TABLE 129	LG CHEM.: PRODUCT OFFERINGS	181
TABLE 130	LG CHEM.: DEALS, 2020-2024	182
TABLE 131	LG CHEM.: OTHERS, 2020-2024	182
11.1.2	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.	184
TABLE 132	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.: COMPANY OVERVIEW	184
FIGURE 48	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.: COMPANY SNAPSHOT	184
TABLE 133	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.: PRODUCT OFFERINGS	185
TABLE 134	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.: PRODUCT LAUNCHES, 2020-2024	186
TABLE 135	JIANGSU CHANGJIAN TECHNOLOGY CO., LTD.: OTHER DEVELOPMENTS, 2020-2024	186
11.1.3	HENKEL AG & CO. KGAA	188
TABLE 136	HENKEL AG & CO. KGAA: COMPANY OVERVIEW	188
FIGURE 49	HENKEL AG & CO. KGAA: COMPANY SNAPSHOT	189
TABLE 137	HENKEL AG & CO. KGAA: PRODUCT OFFERINGS	189
TABLE 138	HENKEL AG & CO. KGAA: PRODUCT LAUNCHES, 2020-2024	190
TABLE 139	HENKEL AG & CO. KGAA: DEALS, 2020-2024	191
TABLE 140	HENKEL AG & CO. KGAA: OTHERS, 2020-2024	191
11.1.4	KYOCERA CORPORATION	193
TABLE 141	KYOCERA CORPORATION: COMPANY OVERVIEW	193
FIGURE 50	KYOCERA CORPORATION: COMPANY SNAPSHOT	194
TABLE 142	KYOCERA CORPORATION: PRODUCT OFFERINGS	194
TABLE 143	KYOCERA CORPORATION: PRODUCT LAUNCHES, 2020-2024	195
TABLE 144	KYOCERA CORPORATION: DEALS, 2020-2024	196
TABLE 145	KYOCERA CORPORATION: OTHER DEVELOPMENTS, 2020-2024	197

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11.1.5 ASE 199

TABLE 146 ASE: COMPANY OVERVIEW 199

FIGURE 51 ASE: COMPANY SNAPSHOT 200

TABLE 147 ASE: PRODUCT OFFERINGS 201

TABLE 148 ASE: PRODUCT LAUNCHES, 2020-2024 202

TABLE 149 ASE: OTHER DEVELOPMENTS, 2020-2024 204

11.1.6 SILICONWARE PRECISION INDUSTRIES CO., LTD. 205

TABLE 150 SILICONWARE PRECISION INDUSTRIES CO., LTD.: COMPANY OVERVIEW 205

FIGURE 52 SILICONWARE PRECISION INDUSTRIES CO., LTD.: COMPANY SNAPSHOT 206

TABLE 151 SILICONWARE PRECISION INDUSTRIES CO., LTD.: PRODUCT OFFERINGS 206

TABLE 152 SILICONWARE PRECISION INDUSTRIES CO., LTD.: DEALS, 2020-2024 209

TABLE 153 SILICONWARE PRECISION INDUSTRIES CO., LTD.: OTHER DEVELOPMENTS, 2020-2024 209

11.1.7 AMKOR TECHNOLOGY 211

TABLE 154 AMKOR TECHNOLOGY: COMPANY OVERVIEW 211

FIGURE 53 AMKOR TECHNOLOGY: COMPANY SNAPSHOT 212

TABLE 155 AMKOR TECHNOLOGY: PRODUCT OFFERINGS 212

TABLE 156 AMKOR TECHNOLOGY: OTHERS, 2020-2024 215

11.1.8 TEXAS INSTRUMENTS 217

TABLE 157 TEXAS INSTRUMENTS: COMPANY OVERVIEW 217

FIGURE 54 TEXAS INSTRUMENTS: COMPANY SNAPSHOT 218

TABLE 158 TEXAS INSTRUMENTS: PRODUCT OFFERINGS 218

TABLE 159 TEXAS INSTRUMENTS: PRODUCT LAUNCHES, 2020-2024 221

TABLE 160 TEXAS INSTRUMENTS: OTHERS, 2020-2024 221

11.1.9 IBIDEN CO., LTD. 223

TABLE 161 IBIDEN CO., LTD.: COMPANY OVERVIEW 223

FIGURE 55 IBIDEN CO., LTD.: COMPANY SNAPSHOT 224

TABLE 162 IBIDEN CO., LTD.: PRODUCT OFFERINGS 225

11.1.10 POWERTECH TECHNOLOGY INC. 227

TABLE 163 POWERTECH TECHNOLOGY INC.: COMPANY OVERVIEW 227

FIGURE 56 POWERTECH TECHNOLOGY INC.: COMPANY SNAPSHOT 228

TABLE 164 POWERTECH TECHNOLOGY INC.: PRODUCT OFFERINGS 228

TABLE 165 POWERTECH TECHNOLOGY INC.: DEALS, 2020-2024 229

*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

11.2 OTHER PLAYERS 230

11.2.1 CHIPMOS TECHNOLOGIES INC. 230

TABLE 166 CHIPMOS TECHNOLOGIES INC.: COMPANY OVERVIEW 230

11.2.2 TONG HSING ELECTRONIC INDUSTRIES LTD. 231

TABLE 167 TONG HSING ELECTRONIC INDUSTRIES LTD.: COMPANY OVERVIEW 231

11.2.3 NEPES CORPORATION LIMITED 232

TABLE 168 NEPES CORPORATION LIMITED: COMPANY OVERVIEW 232

11.2.4 SHINKO ELECTRIC INDUSTRIES CO., LTD. 233

TABLE 169 SHINKO ELECTRIC INDUSTRIES CO., LTD.: COMPANY OVERVIEW 233

11.2.5 DAEDUCK ELECTRONICS CO., LTD. 234

TABLE 170 DAEDUCK ELECTRONICS CO., LTD.: COMPANY OVERVIEW 234

11.2.6 MACDERMID PERFORMANCE SOLUTIONS 235

TABLE 171 MACDERMID PERFORMANCE SOLUTIONS: COMPANY OVERVIEW 235

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11.2.7	RENESAS ELECTRONICS CORPORATION	236
TABLE 172	RENESAS ELECTRONICS CORPORATION: COMPANY OVERVIEW	236
11.2.8	SAMSUNG ELECTRO-MECHANICS	237
TABLE 173	SAMSUNG ELECTRO-MECHANICS: COMPANY OVERVIEW	237
11.2.9	UNIMICRON TECHNOLOGY CORPORATION	238
TABLE 174	UNIMICRON TECHNOLOGY CORPORATION: COMPANY OVERVIEW	238
11.2.10	CHIPBOND TECHNOLOGY CORPORATION	239
TABLE 175	CHIPBOND TECHNOLOGY CORPORATION: COMPANY OVERVIEW	239
11.2.11	TANAKA HOLDINGS CO., LTD.	240
TABLE 176	TANAKA HOLDINGS CO., LTD.: COMPANY OVERVIEW	240
11.2.12	NAN YA PLASTICS CORPORATION	241
TABLE 177	NAN YA PLASTICS CORPORATION: COMPANY OVERVIEW	241
11.2.13	HITACHI HIGH-TECH CORPORATION	242
TABLE 178	HITACHI HIGH-TECH CORPORATION: COMPANY OVERVIEW	242
11.2.14	SUMITOMO CHEMICAL COMPANY LIMITED	243
TABLE 179	SUMITOMO CHEMICAL COMPANY LIMITED: COMPANY OVERVIEW	243
11.2.15	VERISILICON	244
TABLE 180	VERISILICON: COMPANY OVERVIEW	244
12	APPENDIX	245
12.1	DISCUSSION GUIDE	245
12.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	248
12.3	CUSTOMIZATION OPTIONS	250
12.4	RELATED REPORTS	250
12.5	AUTHOR DETAILS	251

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