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Global HBM Non-Conductive Film (NCF) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global HBM Non-Conductive Film (NCF) market size was valued at US$ 247 million in 2025 and is forecast to a readjusted size of US$ 588 million by 2032 with a CAGR of 13.2% during review period.

HBM non-conductive film is a preformed insulating adhesive and underfill film that softens during thermocompression or related die-stacking processes to fill gaps around micro-bumps and then cures to provide mechanical fixation, electrical insulation and stress buffering. Key requirements include uniform film thickness, void-free fine-pitch filling, rapid low-temperature cure, low warpage and long-term compatibility with copper micro-bumps and package interfaces. In 2025, global HBM Non-Conductive Film (NCF) production reached approximately 40 million m².

Increasing HBM stack counts and finer micro-bump pitch expose limits of liquid underfill in flow distance, cycle time and void control, accelerating NCF adoption in thermocompression bonding.

Thinner wafers and larger stacks make warpage and interface-stress management more difficult, increasing demand for NCF with low shrinkage, controlled modulus and uniform thickness.

Memory makers and bonding-equipment suppliers are co-optimizing temperature, pressure, time and film rheology, creating long product lifecycles and high switching barriers once an NCF is qualified on an HBM platform.

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Report Scope

This report is a detailed and comprehensive analysis for global HBM Non-Conductive Film (NCF) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global HBM Non-Conductive Film (NCF) market size and forecasts, in consumption value ($ Million), sales quantity (K Sqm), and average selling prices (US$/Sq m), 2021-2032

Global HBM Non-Conductive Film (NCF) market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Sqm), and average selling prices (US$/Sq m), 2021-2032

Global HBM Non-Conductive Film (NCF) market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (K Sqm), and average selling prices (US$/Sq m), 2021-2032

Global HBM Non-Conductive Film (NCF) market shares of main players, shipments in revenue ($ Million), sales quantity (K Sqm), and ASP (US$/Sq m), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for HBM Non-Conductive Film (NCF)

To forecast future growth in each product and end-use market

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To assess competitive factors affecting the marketplace

This report profiles key players in the global HBM Non-Conductive Film (NCF) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include LG Chem, Resonac, Henkel, Toray, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

HBM Non-Conductive Film (NCF) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Below 10 ?m

10–20 ?m

Above 20 ?m

Market segment by Resin Chemistry

Epoxy-Based

Acrylate-Modified

Hybrid Thermoset

Market segment by Cure Temperature

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Below 150°C

150–180°C

Above 180°C

Market segment by Application

HBM Die Stacking

3D IC Stacking

Fine-Pitch Flip-Chip

Logic-Memory Integration

Other Wafer/Die Bonding

Major players covered

LG Chem

Resonac

Henkel

Toray

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

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Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe HBM Non-Conductive Film (NCF) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of HBM Non-Conductive Film (NCF), with price, sales quantity, revenue, and global market share of HBM Non-Conductive Film (NCF) from 2021 to 2026.

Chapter 3, the HBM Non-Conductive Film (NCF) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the HBM Non-Conductive Film (NCF) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and HBM Non-Conductive Film (NCF) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of HBM Non-Conductive Film (NCF).

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Chapter 14 and 15, to describe HBM Non-Conductive Film (NCF) sales channel, distributors, customers, research findings and conclusion.

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