

Global Heat-resistant Copper-clad Laminates (CCL) 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 Heat-resistant Copper-clad Laminates (CCL) market size was valued at US\$ 5079 million in 2025 and is forecast to a readjusted size of US\$ 13849 million by 2032 with a CAGR of 16.3% during review period.

Heat-resistant copper-clad laminates (CCL) are high-heat-resistance printed circuit board (PCB) substrates manufactured through processes such as resin impregnation, lamination, hot pressing, and cutting, using electronic-grade fiberglass cloth, resin systems, and copper foil as core materials. These materials typically encompass high-Tg epoxy types, halogen-free high-Tg types, BT resin types, polyimide types, and certain high-frequency heat-resistant composite substrates; they are characterized by high glass transition temperatures (Tg), low coefficients of thermal expansion, superior dimensional stability, and strong resistance to thermal shock. They are primarily used in PCB manufacturing applications requiring resilience against reflow soldering, high-layer-count lamination, and long-term thermal loads. In 2025, global sales volume for heat-resistant CCL is estimated at approximately 172 million square meters, with an average unit price of around \$28.7 per square meter and a capacity utilization rate of about 78%. Upstream enterprises operate in sectors such as electronic copper foil, electronic-grade fiberglass cloth, epoxy resins, BT resins, polyimide resins, halogen-free flame retardants, fillers, solvents, copper foil treatment agents, and hot-pressing equipment; downstream enterprises span PCB manufacturing, server motherboards, automotive electronics, communication equipment, industrial controls, semiconductor packaging substrates, and high-reliability electronic assembly. The industry's average gross profit margin ranges from approximately 18% to 32%. The product cost structure comprises copper foil (approx. 32%), electronic fiberglass cloth (approx. 24%), resin and flame-

retardant systems (approx. 22%), energy and hot-pressing processing (approx. 8%), labor and manufacturing overhead (approx. 5%), testing, packaging, and waste/loss (approx. 5%), and R&D, management, and other expenses (approx. 4%). Regarding demand, the list of downstream requirements includes high-Tg multilayer boards, lead-free solderable PCBs, high-layer-count server PCBs, automotive control boards, power electronics circuit boards, communication base station boards, and packaging substrate materials; the list of downstream customers includes PCB manufacturers, server OEMs, automotive electronics suppliers, communication equipment manufacturers, industrial control enterprises, packaging substrate companies, and electronic manufacturing service (EMS) providers. In terms of business opportunities, drivers include policy-led initiatives such as the localization of electronic materials, stricter reliability standards for automotive electronics, and the promotion of green, halogen-free materials and technological innovations, including high-Tg/low-CTE resins, low-loss heat-resistant systems, halogen-free flame-retardant formulations, and upgraded lamination processes for high-layer-count boards. Meanwhile, evolving customer demands reflect a growing emphasis by end-market companies on heat resistance and reliability, batch-to-batch consistency, minimal warpage, low water absorption, and high yields in high-layer interconnects.

This report is a detailed and comprehensive analysis for global Heat-resistant Copper-clad Laminates (CCL) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Tg Temperature 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 Heat-resistant Copper-clad Laminates (CCL) market size and forecasts, in consumption value (\$ Million), sales quantity (M Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Heat-resistant Copper-clad Laminates (CCL) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (M Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Heat-resistant Copper-clad Laminates (CCL) market size and forecasts, by Tg Temperature and by Application, in consumption value (\$ Million), sales quantity (M

Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global Heat-resistant Copper-clad Laminates (CCL) market shares of main players, shipments in revenue (\$ Million), sales quantity (M 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 Heat-resistant Copper-clad Laminates (CCL)

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

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Heat-resistant Copper-clad Laminates (CCL) 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 Shengyi Technology Co., Ltd. (CN), Taiwan Union Technology Corporation, TUC (TW), Rogers Corporation (US), Kingboard Laminates Holdings Ltd. (HK), Goldenmax International Group Ltd. (CN), Panasonic Industry Co., Ltd. (JP), Isola Group (US), Nan Ya Plastics Corporation (TW), ITEQ Corporation (TW), Elite Material Co., Ltd., EMC (TW), etc.

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

Market Segmentation

Heat-resistant Copper-clad Laminates (CCL) market is split by Tg Temperature and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Tg Temperature, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Tg Temperature

170-200°C

>200°C

Market segment by Halogen Content

Halogen-free

Halogenated

Market segment by Application

Switches and 5G Base Stations

Automotive

AI Servers and Communications

Aerospace

Others

Major players covered

Shengyi Technology Co., Ltd. (CN)

Taiwan Union Technology Corporation, TUC (TW)

Rogers Corporation (US)

Kingboard Laminates Holdings Ltd. (HK)

Goldenmax International Group Ltd. (CN)

Panasonic Industry Co., Ltd. (JP)

Isola Group (US)

Nan Ya Plastics Corporation (TW)

ITEQ Corporation (TW)

Elite Material Co., Ltd., EMC (TW)

Doosan Corporation Electro-Materials (KR)

Mitsubishi Gas Chemical Company, Inc., MGC (JP)

Ventec International Group Co., Ltd. (TW)

Resonac Corporation (JP)

AGC Inc. (JP)

Chukoh Chemical Industries, Ltd. (JP)

Guangdong Chaohua Technology Co., Ltd. (CN)

Grace Electron Corp. (CN)

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)

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Heat-resistant Copper-clad Laminates (CCL) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Heat-resistant Copper-clad Laminates (CCL), with price, sales quantity, revenue, and global market share of Heat-resistant Copper-clad Laminates (CCL) from 2021 to 2026.

Chapter 3, the Heat-resistant Copper-clad Laminates (CCL) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Heat-resistant Copper-clad Laminates (CCL) 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 Tg Temperature and by Application, with sales market share and growth rate by Tg Temperature, 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 Heat-resistant Copper-clad Laminates (CCL) market forecast, by regions, by Tg Temperature, 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 Heat-resistant Copper-clad Laminates (CCL).

Chapter 14 and 15, to describe Heat-resistant Copper-clad Laminates (CCL) sales channel, distributors, customers, research findings and conclusion.

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