

Global Heat-resistant Copper-clad Laminates (CCL) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heat-resistant Copper-clad Laminates (CCL) market size is expected to reach \$ 13849 million by 2032, rising at a market growth of 16.3% CAGR during the forecast period (2026-2032).

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 studies the global Heat-resistant Copper-clad Laminates (CCL) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heat-resistant Copper-clad Laminates (CCL) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Heat-resistant Copper-clad Laminates (CCL) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heat-resistant Copper-clad Laminates (CCL) total production and demand, 2021-2032, (M Sqm)

Global Heat-resistant Copper-clad Laminates (CCL) total production value, 2021-2032, (USD Million)

Global Heat-resistant Copper-clad Laminates (CCL) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M Sqm), (based on production site)

Global Heat-resistant Copper-clad Laminates (CCL) consumption by region & country, CAGR, 2021-2032 & (M Sqm)

U.S. VS China: Heat-resistant Copper-clad Laminates (CCL) domestic production, consumption, key domestic manufacturers and share

Global Heat-resistant Copper-clad Laminates (CCL) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M Sqm)

Global Heat-resistant Copper-clad Laminates (CCL) production by Tg Temperature, production, value, CAGR, 2021-2032, (USD Million) & (M Sqm)

Global Heat-resistant Copper-clad Laminates (CCL) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M Sqm)

This report profiles key players in the global Heat-resistant Copper-clad Laminates (CCL) market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Heat-resistant Copper-clad Laminates (CCL) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M Sqm) and average price (US\$/Sq m) by manufacturer, by Tg Temperature, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Heat-resistant Copper-clad Laminates (CCL) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Heat-resistant Copper-clad Laminates (CCL) Market, Segmentation by Tg Temperature:

170-200°C

>200°C

Global Heat-resistant Copper-clad Laminates (CCL) Market, Segmentation by Halogen Content:

Halogen-free

Halogenated

Global Heat-resistant Copper-clad Laminates (CCL) Market, Segmentation by Application:

Switches and 5G Base Stations

Automotive

AI Servers and Communications

Aerospace

Others

Companies Profiled:

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)

Key Questions Answered:

1. How big is the global Heat-resistant Copper-clad Laminates (CCL) market?
2. What is the demand of the global Heat-resistant Copper-clad Laminates (CCL) market?
3. What is the year over year growth of the global Heat-resistant Copper-clad Laminates (CCL) market?
4. What is the production and production value of the global Heat-resistant Copper-clad Laminates (CCL) market?
5. Who are the key producers in the global Heat-resistant Copper-clad Laminates (CCL) market?
6. What are the growth factors driving the market demand?

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Figure 63. Methodology

Figure 64. Research Process and Data Source

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