

Global Non-Conductive Film(NCF) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-Conductive Film(NCF) market size is expected to reach \$ 65.85 million by 2032, rising at a market growth of 19.9% CAGR during the forecast period (2026-2032).

Non-Conductive Film (NCF) is a film-type insulating adhesive material used in advanced semiconductor packaging. It is typically pre-applied or laminated at the interface before bonding between a chip, wafer, or substrate, and provides adhesion, gap filling, electrical insulation, and protection during processes such as thermal compression bonding. NCF itself does not conduct electrical current; electrical connection is mainly achieved through metal interconnect structures such as micro-bumps, copper pillars, or solder bumps. The core function of NCF is to form a stable non-conductive support layer around these interconnect structures, thereby reducing failure risks such as voiding, short circuits, warpage, interfacial delamination, and thermomechanical stress. Compared with conventional liquid underfill materials, NCF offers better control over film thickness and placement accuracy, and is well suited for narrow-gap and fine-pitch packaging structures. It can also reduce process uncertainty associated with subsequent dispensing and capillary flow.

NCF is a key functional film material within the advanced packaging materials value chain. It is mainly used in flip-chip packaging, wafer-level packaging, three-dimensional stacking, TSV memory, high-bandwidth memory, and high-density heterogeneous integration. As demand for high-bandwidth memory, 2.5D packaging, and 3D packaging grows rapidly in AI servers, HPC systems, data centers, and high-end GPUs, packaging structures are subject to increasingly stringent requirements for interlayer gaps, bump protection, thermal compression process windows, low-void filling, and long-term reliability. This has driven NCF to evolve from a niche category within general electronic

adhesive materials into a key material for advanced packaging. In terms of technology development, NCF is moving toward thinner film thickness, lower void rates, greater adaptability to narrow process windows, higher thermomechanical reliability, and closer co-optimization with thermal compression bonding equipment. Public information from Samsung shows that its HBM3E 12H uses advanced Thermal Compression Non-Conductive Film (TC NCF), enabling a 12-layer product to maintain a height specification close to that of an 8-layer product while improving packaging performance by reducing interlayer gaps. Samsung's technical materials also indicate that TC NCF can effectively fill stacked bonding gaps and reduce voids that affect thermal performance. From a market perspective, NCF remains a specialized materials market with a relatively small scale but rapid growth. The number of qualified suppliers is limited, downstream customer qualification cycles are long, and sales are typically not conducted as general spot transactions. Instead, products are usually introduced after customized validation around specific packaging structures, film thickness, flow behavior, curing windows, and reliability data.

The upstream market for NCF mainly includes resin matrices, curing agents, functional fillers, release films, coating substrates, precision coating equipment, clean rewinding, and quality inspection systems. Its cost structure and supply stability are significantly affected by high-purity chemicals, electronic-grade resins, filler particle-size control, film-thickness uniformity, and clean manufacturing capability. Midstream enterprises are responsible for formulation design, coating, lamination, slitting, packaging, and customer qualification. The core industry barriers lie in formulation know-how, batch-to-batch consistency, low-defect production, and coordination with thermal compression bonding processes. Downstream customers mainly include memory manufacturers, advanced packaging houses, IDMs, and OSATs, and demand is directly driven by the capacity expansion of HBM, AI accelerators, advanced logic chips, and heterogeneous integration. At the policy level, both domestic and overseas markets are strengthening advanced packaging and semiconductor materials ecosystems. China's National Integrated Circuit Industry Development Promotion Outline calls for the development of advanced packaging and testing technologies and supports integrated circuit manufacturing, packaging and testing, equipment, and materials through industrial funds and tax incentives. Internationally, the United States regards advanced packaging capability as an important component of the semiconductor manufacturing system. NIST's National Advanced Packaging Manufacturing Program emphasizes that investment in advanced packaging is important to the success of the semiconductor industry and promotes domestic supply-chain capability through advanced packaging R&D and pilot facilities. These policies do not directly determine sales of a single NCF product, but they can indirectly enhance the strategic position of high-reliability

packaging films by expanding advanced packaging R&D, pilot production, and localized supply-chain demand.

In the future, the price, output, and market size of NCF are likely to follow a pattern in which prices for high-end specifications remain resilient, unit costs gradually decline with capacity expansion, and total demand continues to grow. In terms of pricing, because NCF must meet requirements for fine pitch, high stacking, low voiding, and high reliability, and because it must pass stringent customer qualification processes, high-end products used in HBM and 3D packaging are unlikely to become commoditized rapidly in the short term. Their prices will continue to reflect premiums associated with formulation capability, yield performance, reliability data, and supply assurance. However, as leading materials suppliers expand production, processes mature, and yields improve, unit prices for standard specifications or mature packaging applications may gradually stabilize. In terms of output, the expansion of AI chips, HBM3E, HBM4, and advanced packaging capacity will increase NCF shipments. Overall, future NCF growth will depend on higher HBM stack counts, wider adoption of thermal compression bonding, and rising demand for localized advanced packaging materials. At the same time, NCF must also compete with alternative routes such as MR-MUF, NCP, liquid underfill, and hybrid bonding. Therefore, its long-term market potential will be jointly determined by performance reliability, cost efficiency, and the pace at which downstream customers introduce it into mass production.

This report studies the global Non-Conductive Film(NCF) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-Conductive Film(NCF) 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 Non-Conductive Film(NCF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-Conductive Film(NCF) total production and demand, 2021-2032, (Sq m)

Global Non-Conductive Film(NCF) total production value, 2021-2032, (USD Million)

Global Non-Conductive Film(NCF) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Sq m), (based on production site)

Global Non-Conductive Film(NCF) consumption by region & country, CAGR, 2021-2032 & (Sq m)

U.S. VS China: Non-Conductive Film(NCF) domestic production, consumption, key

domestic manufacturers and share

Global Non-Conductive Film(NCF) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Sq m)

Global Non-Conductive Film(NCF) production by Resin Matrix, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

Global Non-Conductive Film(NCF) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

This report profiles key players in the global Non-Conductive Film(NCF) 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 Resonac Corporation, LG Chem, Ltd., Henkel AG & Co. KGaA, Nopion Co., Ltd., Ultra-Pak Industries Co., Ltd., 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 Non-Conductive Film(NCF) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Sq m) and average price (US\$/Sq m) by manufacturer, by Resin Matrix, 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 Non-Conductive Film(NCF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Conductive Film(NCF) Market, Segmentation by Resin Matrix:

Epoxy-Based NCF

Acrylic-Based NCF

Other

Global Non-Conductive Film(NCF) Market, Segmentation by Pre-Applied Position:

Wafer-Applied NCF

Substrate-Applied NCF

Global Non-Conductive Film(NCF) Market, Segmentation by Bonding Process:

Thermal Compression Bonding NCF

Low-Temperature Bonding NCF

Global Non-Conductive Film(NCF) Market, Segmentation by Supply Form:

Roll-Form NCF

Sheet-Form NCF

Global Non-Conductive Film(NCF) Market, Segmentation by Application:

Die-To-Die Stacking

Die-To-Wafer Bonding

Die-To-Substrate Interconnect

Companies Profiled:

Resonac Corporation

LG Chem, Ltd.

Henkel AG & Co. KGaA

Nopion Co., Ltd.

Ultra-Pak Industries Co., Ltd.

Key Questions Answered:

1. How big is the global Non-Conductive Film(NCF) market?
2. What is the demand of the global Non-Conductive Film(NCF) market?
3. What is the year over year growth of the global Non-Conductive Film(NCF) market?
4. What is the production and production value of the global Non-Conductive Film(NCF) market?
5. Who are the key producers in the global Non-Conductive Film(NCF) market?
6. What are the growth factors driving the market demand?

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