

Global 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 Non-Conductive Film(NCF) market size was valued at US\$ 15.30 million in 2025 and is forecast to a readjusted size of US\$ 65.85 million by 2032 with a CAGR of 19.9% during review period.

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 is a detailed and comprehensive analysis for global Non-Conductive Film(NCF) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Resin Matrix 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 Non-Conductive Film(NCF) market size and forecasts, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Non-Conductive Film(NCF) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices

(US\$/Sq m), 2021-2032

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

Global Non-Conductive Film(NCF) market shares of main players, shipments in revenue (\$ Million), sales quantity (Sq m), 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 Non-Conductive Film(NCF)

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 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 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.

Market Segmentation

Non-Conductive Film(NCF) market is split by Resin Matrix and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Resin Matrix, 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 Resin Matrix

Epoxy-Based NCF

Acrylic-Based NCF

Other

Market segment by Pre-Applied Position

Wafer-Applied NCF

Substrate-Applied NCF

Market segment by Bonding Process

Thermal Compression Bonding NCF

Low-Temperature Bonding NCF

Market segment by Supply Form

Roll-Form NCF

Sheet-Form NCF

Market segment by Application

Die-To-Die Stacking

Die-To-Wafer Bonding

Die-To-Substrate Interconnect

Major players covered

Resonac Corporation

LG Chem, Ltd.

Henkel AG & Co. KGaA

Nopion Co., Ltd.

Ultra-Pak Industries Co., Ltd.

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 Non-Conductive Film(NCF) product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the 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 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 Resin Matrix and by Application, with sales market share and growth rate by Resin Matrix, 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 Non-Conductive Film(NCF) market forecast, by regions, by Resin Matrix, 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 Non-Conductive Film(NCF).

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

Contents

1 MARKET OVERVIEW

- 1.1 Product Overview and Scope
- 1.2 Market Estimation Caveats and Base Year
- 1.3 Market Analysis by Resin Matrix
 - 1.3.1 Overview: Global Non-Conductive Film(NCF) Consumption Value by Resin Matrix: 2021 Versus 2025 Versus 2032
 - 1.3.2 Epoxy-Based NCF
 - 1.3.3 Acrylic-Based NCF
 - 1.3.4 Other
- 1.4 Market Analysis by Pre-Applied Position
 - 1.4.1 Overview: Global Non-Conductive Film(NCF) Consumption Value by Pre-Applied Position: 2021 Versus 2025 Versus 2032
 - 1.4.2 Wafer-Applied NCF
 - 1.4.3 Substrate-Applied NCF
- 1.5 Market Analysis by Bonding Process
 - 1.5.1 Overview: Global Non-Conductive Film(NCF) Consumption Value by Bonding Process: 2021 Versus 2025 Versus 2032
 - 1.5.2 Thermal Compression Bonding NCF
 - 1.5.3 Low-Temperature Bonding NCF
- 1.6 Market Analysis by Supply Form
 - 1.6.1 Overview: Global Non-Conductive Film(NCF) Consumption Value by Supply Form: 2021 Versus 2025 Versus 2032
 - 1.6.2 Roll-Form NCF
 - 1.6.3 Sheet-Form NCF
- 1.7 Market Analysis by Application
 - 1.7.1 Overview: Global Non-Conductive Film(NCF) Consumption Value by Application: 2021 Versus 2025 Versus 2032
 - 1.7.2 Die-To-Die Stacking
 - 1.7.3 Die-To-Wafer Bonding
 - 1.7.4 Die-To-Substrate Interconnect
- 1.8 Global Non-Conductive Film(NCF) Market Size & Forecast
 - 1.8.1 Global Non-Conductive Film(NCF) Consumption Value (2021 & 2025 & 2032)
 - 1.8.2 Global Non-Conductive Film(NCF) Sales Quantity (2021-2032)
 - 1.8.3 Global Non-Conductive Film(NCF) Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Resonac Corporation

2.1.1 Resonac Corporation Details

2.1.2 Resonac Corporation Major Business

2.1.3 Resonac Corporation Non-Conductive Film(NCF) Product and Services

2.1.4 Resonac Corporation Non-Conductive Film(NCF) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Resonac Corporation Recent Developments/Updates

2.2 LG Chem, Ltd.

2.2.1 LG Chem, Ltd. Details

2.2.2 LG Chem, Ltd. Major Business

2.2.3 LG Chem, Ltd. Non-Conductive Film(NCF) Product and Services

2.2.4 LG Chem, Ltd. Non-Conductive Film(NCF) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 LG Chem, Ltd. Recent Developments/Updates

2.3 Henkel AG & Co. KGaA

2.3.1 Henkel AG & Co. KGaA Details

2.3.2 Henkel AG & Co. KGaA Major Business

2.3.3 Henkel AG & Co. KGaA Non-Conductive Film(NCF) Product and Services

2.3.4 Henkel AG & Co. KGaA Non-Conductive Film(NCF) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Henkel AG & Co. KGaA Recent Developments/Updates

2.4 Nopion Co., Ltd.

2.4.1 Nopion Co., Ltd. Details

2.4.2 Nopion Co., Ltd. Major Business

2.4.3 Nopion Co., Ltd. Non-Conductive Film(NCF) Product and Services

2.4.4 Nopion Co., Ltd. Non-Conductive Film(NCF) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Nopion Co., Ltd. Recent Developments/Updates

2.5 Ultra-Pak Industries Co., Ltd.

2.5.1 Ultra-Pak Industries Co., Ltd. Details

2.5.2 Ultra-Pak Industries Co., Ltd. Major Business

2.5.3 Ultra-Pak Industries Co., Ltd. Non-Conductive Film(NCF) Product and Services

2.5.4 Ultra-Pak Industries Co., Ltd. Non-Conductive Film(NCF) Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Ultra-Pak Industries Co., Ltd. Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: NON-CONDUCTIVE FILM(NCF) BY MANUFACTURER

- 3.1 Global Non-Conductive Film(NCF) Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Non-Conductive Film(NCF) Revenue by Manufacturer (2021-2026)
- 3.3 Global Non-Conductive Film(NCF) Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Non-Conductive Film(NCF) by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Non-Conductive Film(NCF) Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Non-Conductive Film(NCF) Manufacturer Market Share in 2025
- 3.5 Non-Conductive Film(NCF) Market: Overall Company Footprint Analysis
 - 3.5.1 Non-Conductive Film(NCF) Market: Region Footprint
 - 3.5.2 Non-Conductive Film(NCF) Market: Company Product Type Footprint
 - 3.5.3 Non-Conductive Film(NCF) Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Non-Conductive Film(NCF) Market Size by Region
 - 4.1.1 Global Non-Conductive Film(NCF) Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Non-Conductive Film(NCF) Consumption Value by Region (2021-2032)
 - 4.1.3 Global Non-Conductive Film(NCF) Average Price by Region (2021-2032)
- 4.2 North America Non-Conductive Film(NCF) Consumption Value (2021-2032)
- 4.3 Europe Non-Conductive Film(NCF) Consumption Value (2021-2032)
- 4.4 Asia-Pacific Non-Conductive Film(NCF) Consumption Value (2021-2032)
- 4.5 South America Non-Conductive Film(NCF) Consumption Value (2021-2032)
- 4.6 Middle East & Africa Non-Conductive Film(NCF) Consumption Value (2021-2032)

5 MARKET SEGMENT BY RESIN MATRIX

- 5.1 Global Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)
- 5.2 Global Non-Conductive Film(NCF) Consumption Value by Resin Matrix (2021-2032)
- 5.3 Global Non-Conductive Film(NCF) Average Price by Resin Matrix (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)
- 6.2 Global Non-Conductive Film(NCF) Consumption Value by Application (2021-2032)
- 6.3 Global Non-Conductive Film(NCF) Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)

7.2 North America Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)

7.3 North America Non-Conductive Film(NCF) Market Size by Country

7.3.1 North America Non-Conductive Film(NCF) Sales Quantity by Country (2021-2032)

7.3.2 North America Non-Conductive Film(NCF) Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)

8.2 Europe Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)

8.3 Europe Non-Conductive Film(NCF) Market Size by Country

8.3.1 Europe Non-Conductive Film(NCF) Sales Quantity by Country (2021-2032)

8.3.2 Europe Non-Conductive Film(NCF) Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)

9.2 Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Non-Conductive Film(NCF) Market Size by Region

9.3.1 Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Non-Conductive Film(NCF) Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

- 9.3.5 South Korea Market Size and Forecast (2021-2032)
- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)
- 10.2 South America Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)
- 10.3 South America Non-Conductive Film(NCF) Market Size by Country
 - 10.3.1 South America Non-Conductive Film(NCF) Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Non-Conductive Film(NCF) Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2032)
- 11.2 Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Non-Conductive Film(NCF) Market Size by Country
 - 11.3.1 Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Non-Conductive Film(NCF) Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Non-Conductive Film(NCF) Market Drivers
- 12.2 Non-Conductive Film(NCF) Market Restraints

12.3 Non-Conductive Film(NCF) Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Non-Conductive Film(NCF) and Key Manufacturers

13.2 Manufacturing Costs Percentage of Non-Conductive Film(NCF)

13.3 Non-Conductive Film(NCF) Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Non-Conductive Film(NCF) Typical Distributors

14.3 Non-Conductive Film(NCF) Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Non-Conductive Film(NCF) Consumption Value by Resin Matrix, (USD Million), 2021 & 2025 & 2032

Table 2. Global Non-Conductive Film(NCF) Consumption Value by Pre-Applied Position, (USD Million), 2021 & 2025 & 2032

Table 3. Global Non-Conductive Film(NCF) Consumption Value by Bonding Process, (USD Million), 2021 & 2025 & 2032

Table 4. Global Non-Conductive Film(NCF) Consumption Value by Supply Form, (USD Million), 2021 & 2025 & 2032

Table 5. Global Non-Conductive Film(NCF) Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 6. Resonac Corporation Basic Information, Manufacturing Base and Competitors

Table 7. Resonac Corporation Major Business

Table 8. Resonac Corporation Non-Conductive Film(NCF) Product and Services

Table 9. Resonac Corporation Non-Conductive Film(NCF) Sales Quantity (Sq m), Average Price (US\$/Sq m), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 10. Resonac Corporation Recent Developments/Updates

Table 11. LG Chem, Ltd. Basic Information, Manufacturing Base and Competitors

Table 12. LG Chem, Ltd. Major Business

Table 13. LG Chem, Ltd. Non-Conductive Film(NCF) Product and Services

Table 14. LG Chem, Ltd. Non-Conductive Film(NCF) Sales Quantity (Sq m), Average Price (US\$/Sq m), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 15. LG Chem, Ltd. Recent Developments/Updates

Table 16. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 17. Henkel AG & Co. KGaA Major Business

Table 18. Henkel AG & Co. KGaA Non-Conductive Film(NCF) Product and Services

Table 19. Henkel AG & Co. KGaA Non-Conductive Film(NCF) Sales Quantity (Sq m), Average Price (US\$/Sq m), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 20. Henkel AG & Co. KGaA Recent Developments/Updates

Table 21. Nopion Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 22. Nopion Co., Ltd. Major Business

Table 23. Nopion Co., Ltd. Non-Conductive Film(NCF) Product and Services

- Table 24. Nopion Co., Ltd. Non-Conductive Film(NCF) Sales Quantity (Sq m), Average Price (US\$/Sq m), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 25. Nopion Co., Ltd. Recent Developments/Updates
- Table 26. Ultra-Pak Industries Co., Ltd. Basic Information, Manufacturing Base and Competitors
- Table 27. Ultra-Pak Industries Co., Ltd. Major Business
- Table 28. Ultra-Pak Industries Co., Ltd. Non-Conductive Film(NCF) Product and Services
- Table 29. Ultra-Pak Industries Co., Ltd. Non-Conductive Film(NCF) Sales Quantity (Sq m), Average Price (US\$/Sq m), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 30. Ultra-Pak Industries Co., Ltd. Recent Developments/Updates
- Table 31. Global Non-Conductive Film(NCF) Sales Quantity by Manufacturer (2021-2026) & (Sq m)
- Table 32. Global Non-Conductive Film(NCF) Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 33. Global Non-Conductive Film(NCF) Average Price by Manufacturer (2021-2026) & (US\$/Sq m)
- Table 34. Market Position of Manufacturers in Non-Conductive Film(NCF), (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 35. Head Office and Non-Conductive Film(NCF) Production Site of Key Manufacturer
- Table 36. Non-Conductive Film(NCF) Market: Company Product Type Footprint
- Table 37. Non-Conductive Film(NCF) Market: Company Product Application Footprint
- Table 38. Non-Conductive Film(NCF) New Market Entrants and Barriers to Market Entry
- Table 39. Non-Conductive Film(NCF) Mergers, Acquisition, Agreements, and Collaborations
- Table 40. Global Non-Conductive Film(NCF) Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 41. Global Non-Conductive Film(NCF) Sales Quantity by Region (2021-2026) & (Sq m)
- Table 42. Global Non-Conductive Film(NCF) Sales Quantity by Region (2027-2032) & (Sq m)
- Table 43. Global Non-Conductive Film(NCF) Consumption Value by Region (2021-2026) & (USD Million)
- Table 44. Global Non-Conductive Film(NCF) Consumption Value by Region (2027-2032) & (USD Million)
- Table 45. Global Non-Conductive Film(NCF) Average Price by Region (2021-2026) &

(US\$/Sq m)

Table 46. Global Non-Conductive Film(NCF) Average Price by Region (2027-2032) & (US\$/Sq m)

Table 47. Global Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 48. Global Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2027-2032) & (Sq m)

Table 49. Global Non-Conductive Film(NCF) Consumption Value by Resin Matrix (2021-2026) & (USD Million)

Table 50. Global Non-Conductive Film(NCF) Consumption Value by Resin Matrix (2027-2032) & (USD Million)

Table 51. Global Non-Conductive Film(NCF) Average Price by Resin Matrix (2021-2026) & (US\$/Sq m)

Table 52. Global Non-Conductive Film(NCF) Average Price by Resin Matrix (2027-2032) & (US\$/Sq m)

Table 53. Global Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 54. Global Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 55. Global Non-Conductive Film(NCF) Consumption Value by Application (2021-2026) & (USD Million)

Table 56. Global Non-Conductive Film(NCF) Consumption Value by Application (2027-2032) & (USD Million)

Table 57. Global Non-Conductive Film(NCF) Average Price by Application (2021-2026) & (US\$/Sq m)

Table 58. Global Non-Conductive Film(NCF) Average Price by Application (2027-2032) & (US\$/Sq m)

Table 59. North America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 60. North America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2027-2032) & (Sq m)

Table 61. North America Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 62. North America Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 63. North America Non-Conductive Film(NCF) Sales Quantity by Country (2021-2026) & (Sq m)

Table 64. North America Non-Conductive Film(NCF) Sales Quantity by Country (2027-2032) & (Sq m)

Table 65. North America Non-Conductive Film(NCF) Consumption Value by Country (2021-2026) & (USD Million)

Table 66. North America Non-Conductive Film(NCF) Consumption Value by Country (2027-2032) & (USD Million)

Table 67. Europe Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 68. Europe Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2027-2032) & (Sq m)

Table 69. Europe Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 70. Europe Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 71. Europe Non-Conductive Film(NCF) Sales Quantity by Country (2021-2026) & (Sq m)

Table 72. Europe Non-Conductive Film(NCF) Sales Quantity by Country (2027-2032) & (Sq m)

Table 73. Europe Non-Conductive Film(NCF) Consumption Value by Country (2021-2026) & (USD Million)

Table 74. Europe Non-Conductive Film(NCF) Consumption Value by Country (2027-2032) & (USD Million)

Table 75. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 76. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2027-2032) & (Sq m)

Table 77. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 78. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 79. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Region (2021-2026) & (Sq m)

Table 80. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity by Region (2027-2032) & (Sq m)

Table 81. Asia-Pacific Non-Conductive Film(NCF) Consumption Value by Region (2021-2026) & (USD Million)

Table 82. Asia-Pacific Non-Conductive Film(NCF) Consumption Value by Region (2027-2032) & (USD Million)

Table 83. South America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 84. South America Non-Conductive Film(NCF) Sales Quantity by Resin Matrix

(2027-2032) & (Sq m)

Table 85. South America Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 86. South America Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 87. South America Non-Conductive Film(NCF) Sales Quantity by Country (2021-2026) & (Sq m)

Table 88. South America Non-Conductive Film(NCF) Sales Quantity by Country (2027-2032) & (Sq m)

Table 89. South America Non-Conductive Film(NCF) Consumption Value by Country (2021-2026) & (USD Million)

Table 90. South America Non-Conductive Film(NCF) Consumption Value by Country (2027-2032) & (USD Million)

Table 91. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2021-2026) & (Sq m)

Table 92. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Resin Matrix (2027-2032) & (Sq m)

Table 93. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Application (2021-2026) & (Sq m)

Table 94. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Application (2027-2032) & (Sq m)

Table 95. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Country (2021-2026) & (Sq m)

Table 96. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity by Country (2027-2032) & (Sq m)

Table 97. Middle East & Africa Non-Conductive Film(NCF) Consumption Value by Country (2021-2026) & (USD Million)

Table 98. Middle East & Africa Non-Conductive Film(NCF) Consumption Value by Country (2027-2032) & (USD Million)

Table 99. Non-Conductive Film(NCF) Raw Material

Table 100. Key Manufacturers of Non-Conductive Film(NCF) Raw Materials

Table 101. Non-Conductive Film(NCF) Typical Distributors

Table 102. Non-Conductive Film(NCF) Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Non-Conductive Film(NCF) Picture
- Figure 2. Global Non-Conductive Film(NCF) Revenue by Resin Matrix, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Non-Conductive Film(NCF) Revenue Market Share by Resin Matrix in 2025
- Figure 4. Epoxy-Based NCF Examples
- Figure 5. Acrylic-Based NCF Examples
- Figure 6. Other Examples
- Figure 7. Global Non-Conductive Film(NCF) Revenue by Pre-Applied Position, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global Non-Conductive Film(NCF) Revenue Market Share by Pre-Applied Position in 2025
- Figure 9. Wafer-Applied NCF Examples
- Figure 10. Substrate-Applied NCF Examples
- Figure 11. Global Non-Conductive Film(NCF) Revenue by Bonding Process, (USD Million), 2021 & 2025 & 2032
- Figure 12. Global Non-Conductive Film(NCF) Revenue Market Share by Bonding Process in 2025
- Figure 13. Thermal Compression Bonding NCF Examples
- Figure 14. Low-Temperature Bonding NCF Examples
- Figure 15. Global Non-Conductive Film(NCF) Revenue by Supply Form, (USD Million), 2021 & 2025 & 2032
- Figure 16. Global Non-Conductive Film(NCF) Revenue Market Share by Supply Form in 2025
- Figure 17. Roll-Form NCF Examples
- Figure 18. Sheet-Form NCF Examples
- Figure 19. Global Non-Conductive Film(NCF) Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 20. Global Non-Conductive Film(NCF) Revenue Market Share by Application in 2025
- Figure 21. Die-To-Die Stacking Examples
- Figure 22. Die-To-Wafer Bonding Examples
- Figure 23. Die-To-Substrate Interconnect Examples
- Figure 24. Global Non-Conductive Film(NCF) Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 25. Global Non-Conductive Film(NCF) Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 26. Global Non-Conductive Film(NCF) Sales Quantity (2021-2032) & (Sq m)

Figure 27. Global Non-Conductive Film(NCF) Price (2021-2032) & (US\$/Sq m)

Figure 28. Global Non-Conductive Film(NCF) Sales Quantity Market Share by Manufacturer in 2025

Figure 29. Global Non-Conductive Film(NCF) Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of Non-Conductive Film(NCF) by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 Non-Conductive Film(NCF) Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 Non-Conductive Film(NCF) Manufacturer (Revenue) Market Share in 2025

Figure 33. Global Non-Conductive Film(NCF) Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global Non-Conductive Film(NCF) Consumption Value Market Share by Region (2021-2032)

Figure 35. North America Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 38. South America Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 40. Global Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 41. Global Non-Conductive Film(NCF) Consumption Value Market Share by Resin Matrix (2021-2032)

Figure 42. Global Non-Conductive Film(NCF) Average Price by Resin Matrix (2021-2032) & (US\$/Sq m)

Figure 43. Global Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global Non-Conductive Film(NCF) Revenue Market Share by Application (2021-2032)

Figure 45. Global Non-Conductive Film(NCF) Average Price by Application (2021-2032)

& (US\$/Sq m)

Figure 46. North America Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 47. North America Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America Non-Conductive Film(NCF) Sales Quantity Market Share by Country (2021-2032)

Figure 49. North America Non-Conductive Film(NCF) Consumption Value Market Share by Country (2021-2032)

Figure 50. United States Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 54. Europe Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe Non-Conductive Film(NCF) Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe Non-Conductive Film(NCF) Consumption Value Market Share by Country (2021-2032)

Figure 57. Germany Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 58. France Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 63. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific Non-Conductive Film(NCF) Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific Non-Conductive Film(NCF) Consumption Value Market Share by Region (2021-2032)

Figure 66. China Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 69. India Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 72. South America Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 73. South America Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America Non-Conductive Film(NCF) Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America Non-Conductive Film(NCF) Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity Market Share by Resin Matrix (2021-2032)

Figure 79. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa Non-Conductive Film(NCF) Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa Non-Conductive Film(NCF) Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 83. Egypt Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia Non-Conductive Film(NCF) Consumption Value (2021-2032) &

(USD Million)

Figure 85. South Africa Non-Conductive Film(NCF) Consumption Value (2021-2032) & (USD Million)

Figure 86. Non-Conductive Film(NCF) Market Drivers

Figure 87. Non-Conductive Film(NCF) Market Restraints

Figure 88. Non-Conductive Film(NCF) Market Trends

Figure 89. Porters Five Forces Analysis

Figure 90. Manufacturing Cost Structure Analysis of Non-Conductive Film(NCF) in 2025

Figure 91. Manufacturing Process Analysis of Non-Conductive Film(NCF)

Figure 92. Non-Conductive Film(NCF) Industrial Chain

Figure 93. Sales Channel: Direct to End-User vs Distributors

Figure 94. Direct Channel Pros & Cons

Figure 95. Indirect Channel Pros & Cons

Figure 96. Methodology

Figure 97. Research Process and Data Source

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