

Global TC NCF Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global TC NCF market size is expected to reach \$ 38.94 million by 2032, rising at a market growth of 19.7% CAGR during the forecast period (2026-2032).

Thermal Compression Non-Conductive Film, abbreviated as TC NCF, is a thin-film non-conductive adhesive material used in thermal compression bonding processes for advanced semiconductor packaging. In essence, during chip stacking or chip-to-substrate interconnection, it uses the combined effect of heat and pressure to provide insulating filling, gap support, interfacial adhesion, and solder joint protection between micro-bumps, while preventing electrical short circuits between adjacent interconnection points. Compared with conventional underfill materials, TC NCF places greater emphasis on a pre-applied film format, micron-level thickness control, flowability and curing stability during thermal compression, and low-void performance in high-density bump arrays. Unlike conductive film materials, TC NCF itself does not perform an electrical conduction function. Electrical connection is mainly achieved through copper pillars, solder bumps, or micro-bumps, while the material itself provides insulation, filling, protection, and reliability maintenance. This product is particularly suitable for HBM, TSV memory, 2.5D and 3D packaging, high-performance computing chips, and AI accelerator packaging, where requirements for interlayer gaps, package height, thermal paths, and long-term reliability are extremely high.

TC NCF occupies a critical position as a functional film material in the advanced packaging materials value chain. It connects upstream resin systems, fillers, release films, coating materials, and functional additives, and is directly linked to downstream demand from HBM manufacturing, wafer-level packaging, flip-chip packaging, and system-level advanced packaging. Its role is not merely to replace conventional adhesives, but to address systematic challenges in high-density multi-chip stacking,

including micro-bump protection, interlayer gap filling, electrical insulation, thermal compression process-window stability, and stack reliability. With the development of HBM3E, HBM4, and higher-stack HBM, the technical direction of TC NCF is shifting from conventional adhesive materials toward thinner film thickness, lower voiding, higher T_g, lower CTE, lower dielectric loss, and improved thermal management. The current market remains at a stage characterized by high entry barriers, small scale, and rapid growth. Resonac has announced capacity expansion for AI semiconductor materials such as NCF and TIM, with the goal of increasing related capacity to 3.5 to 5 times the current level. This shows that core suppliers already regard this class of materials as a strategic product for the growth of AI chips and HBM advanced packaging. From the perspective of upstream and downstream market influence, the upstream side of TC NCF is mainly affected by high-performance resins, low ionic impurity control, precision coating equipment, functional fillers, and semiconductor-grade clean manufacturing capabilities. Midstream companies need capabilities in formulation development, film-thickness uniformity control, thermal compression rheology adjustment, reliability validation, and customer co-qualification. Downstream demand is jointly driven by HBM memory manufacturers, advanced packaging houses, OSATs, AI accelerator supply chains, and data center chip demand. Growth in HBM will directly expand the potential demand for TC NCF, but different packaging routes will affect its penetration rate. Samsung continues to maintain and improve the TC NCF route, while SK hynix has formed strong competition in HBM through the MR-MUF route. This means that the TC NCF market will not expand linearly with total HBM volume, but will instead be jointly determined by customer process choices, yield performance, and thermal management capability. In terms of policy, the United States emphasizes building domestic advanced packaging capabilities; China's integrated circuit industry policies continue to support materials, packaging, and testing; South Korea is promoting semiconductor cluster development; and Japan maintains advantages in materials and equipment. These policies will enhance the strategic importance of advanced packaging materials and promote regional supply-chain localization and diversification, while also intensifying competition in customer qualification, export controls, and supply security. Looking ahead, the price, output, and market size of TC NCF are expected to show a trend of steadily rising unit prices, rapid output growth, and gradual divergence in long-term growth rates. In the short term, HBM3E and HBM4 will drive higher chip stack counts, narrower interlayer gaps, and greater difficulty in thermal resistance and warpage control, which is expected to increase the unit value of high-end TC NCF. In particular, products with low voiding, low CTE, low dielectric performance, and enhanced thermal conductivity are likely to command higher premiums. In the medium term, capacity expansion by materials companies such as Resonac will release additional supply, enabling output to grow

alongside the ramp-up of HBM and advanced packaging. However, capacity expansion will not immediately lead to a sharp price decline, because TC NCF requires long customer qualification cycles, and different customers have varying requirements for film thickness, thermal compression process windows, and reliability. Overall, TC NCF is expected to maintain a clear expansion trend.

This report studies the global TC NCF production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for TC 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 TC NCF that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global TC NCF total production and demand, 2021-2032, (K Sqm)

Global TC NCF total production value, 2021-2032, (USD Million)

Global TC NCF production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global TC NCF consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: TC NCF domestic production, consumption, key domestic manufacturers and share

Global TC NCF production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global TC NCF production by Package Generation Positioning, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global TC NCF production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global TC 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, ADEKA, Henkel AG & Co. KGaA, LG Chem, Nopion, U-PAK, 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 TC NCF market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sq m) by manufacturer, by Package Generation Positioning, 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 TC NCF Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global TC NCF Market, Segmentation by Package Generation Positioning:

TC NCF For HBM3E And Above Packaging

Regular TC NCF For General HBM And TSV Packaging

TC NCF For General Advanced Packaging

Global TC NCF Market, Segmentation by Product Physical Form:

Roll-form TC NCF

Sheet-form TC NCF

Other

Global TC NCF Market, Segmentation by Dielectric Performance Positioning:

Low-Dielectric TC NCF

Standard-Insulation TC NCF

Global TC NCF Market, Segmentation by Application:

Die-To-Die Stacking

Die-To-Wafer Bonding

Die-To-Substrate Interconnect

Companies Profiled:

Resonac

ADEKA

Henkel AG & Co. KGaA

LG Chem

Nopion

U-PAK

Key Questions Answered:

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

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