

Global TC NCF Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G2E84E3E17C9EN.html>

Date: June 2026

Pages: 95

Price: US\$ 3,480.00 (Single User License)

ID: G2E84E3E17C9EN

Abstracts

According to our (Global Info Research) latest study, the global TC NCF market size was valued at US\$ 8.04 million in 2025 and is forecast to a readjusted size of US\$ 38.94 million by 2032 with a CAGR of 19.7% during review period.

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 Tg, 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 is a detailed and comprehensive analysis for global TC NCF market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Package Generation Positioning 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 TC NCF market size and forecasts, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global TC NCF market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global TC NCF market size and forecasts, by Package Generation Positioning and by Application, in consumption value (\$ Million), sales quantity (K Sqm), and average selling prices (US\$/Sq m), 2021-2032

Global TC NCF market shares of main players, shipments in revenue (\$ Million), sales quantity (K 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 TC 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 TC 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, 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.

Market Segmentation

TC NCF market is split by Package Generation Positioning and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Package Generation Positioning, 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 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

Market segment by Product Physical Form

- Roll-form TC NCF

- Sheet-form TC NCF

- Other

Market segment by Dielectric Performance Positioning

Low-Dielectric TC NCF

Standard-Insulation TC NCF

Market segment by Application

Die-To-Die Stacking

Die-To-Wafer Bonding

Die-To-Substrate Interconnect

Major players covered

Resonac

ADEKA

Henkel AG & Co. KGaA

LG Chem

Nopion

U-PAK

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 TC NCF product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of TC NCF, with price, sales quantity, revenue, and global market share of TC NCF from 2021 to 2026.

Chapter 3, the TC NCF competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the TC 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 Package Generation Positioning and by Application, with sales market share and growth rate by Package Generation Positioning, 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 TC NCF market forecast, by regions, by Package Generation Positioning, 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 TC NCF.

Chapter 14 and 15, to describe TC NCF sales channel, distributors, customers, research findings and conclusion.

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