

Global Chip On Film Underfill (COF) Market Growth 2026-2032

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Abstracts

The global Chip On Film Underfill (COF) market size is predicted to grow from US\$ 391 million in 2025 to US\$ 651 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

Chip On Film Underfill refers to underfill materials designed for chip on film packages where a die is mounted onto a flexible film carrier. Typical form factors include paste type underfills and film type non conductive films, most commonly based on epoxy chemistries with tailored curing systems, tougheners, and inorganic fillers. By filling and curing within the micro gaps between the die, the film substrate, and the interconnect region, COF underfill forms an electrically insulating, low moisture uptake, thermally robust solid that also mitigates interfacial stress. This enables higher assembly yield and improved long term reliability under thermal cycling, humidity exposure, mechanical shock, and bending loads. Applications are centered on display driver related packaging and module interconnects where higher resolution, narrower bezels, and flexible form factors demand fine gap filling, low voiding, and stable lifetime performance.

Manufacturing and supply are closely aligned with East Asian display and packaging ecosystems, while automotive and industrial display chains are increasingly adopting higher reliability grades.

In 2025, global shipments of Chip On Film Underfill materials for COF packages, including paste type underfills and film type solutions such as NCF, were reasonably estimated at about 1.6–2.6 thousand metric tons. On a manufacturer ex works basis approximating FOB, mainstream paste type COF underfill pricing typically fell around USD 120–220 per kg, while film type COF underfill generally commanded USD 260–600 per kg due to higher form factor and process integration requirements. On a blended, revenue weighted basis across major product types, the 2025 global average FOB price

was estimated at roughly USD 180–320 per kg.

From a global perspective, the value proposition of COF underfill is shifting from simple mechanical reinforcement to an integrated capability that stabilizes process windows and reliability at scale. As displays move toward thinner builds, higher pixel density, and more complex module integration, gaps tighten and takt times compress. Underfill materials must simultaneously deliver controlled flow and repeatable cure, low moisture uptake and strong electrical insulation, and effective stress management against thermo mechanical mismatch. These attributes translate directly into yield, rework, and lifetime cost, supporting more consistent adoption in mainstream display supply chains. In parallel, stricter automotive durability requirements in temperature and humidity cycling are accelerating demand for high temperature and high reliability underfills, pushing suppliers toward deeper co development with assembly lines around qualification metrics and manufacturing windows rather than stand alone material supply.

The key challenges and risks are driven by strong process coupling and qualification barriers. COF structures combine materials with markedly different thermo mechanical behavior, and insufficient control of flow, venting, and cure profiles can amplify voiding, delamination, and stress concentration during thermal cycling and bending, creating more complex failure modes. In addition, underfill formulations are often tightly matched to customer equipment settings, bonding pressure and temperature profiles, and the broader material stack, so reformulation or supplier switching can trigger re qualification cycles. Coupled with consistency and traceability requirements, this dynamic favors suppliers with proven mass production stability. Looking ahead, downstream demand is expected to concentrate further on routes that support finer gaps, higher throughput, and higher reliability thresholds. Film based and no flow compatible solutions should continue to gain penetration, while consumer and automotive display chains will show clearer performance tiers and pricing tiers aligned with reliability obligations.

LP Information, Inc. (LPI) ' newest research report, the “Chip On Film Underfill (COF) Industry Forecast” looks at past sales and reviews total world Chip On Film Underfill (COF) sales in 2025, providing a comprehensive analysis by region and market sector of projected Chip On Film Underfill (COF) sales for 2026 through 2032. With Chip On Film Underfill (COF) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Chip On Film Underfill (COF) industry.

This Insight Report provides a comprehensive analysis of the global Chip On Film Underfill (COF) landscape and highlights key trends related to product segmentation,

company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Chip On Film Underfill (COF) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Chip On Film Underfill (COF) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Chip On Film Underfill (COF) and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Chip On Film Underfill (COF).

This report presents a comprehensive overview, market shares, and growth opportunities of Chip On Film Underfill (COF) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Capillary Underfill (CUF)

Non-Conductive Paste (NCP)

Non-Conductive Film (NCF)

Others

Segmentation by Package Type:

Chip On Film (COF)

Wafer Level Chip Scale Package (WLCSP)

Others

Segmentation by Curing Process:

Thermal Cure

Ultraviolet (UV) Cure

Others

Segmentation by Material Chemistry:

Epoxy-Based Underfill

Silicone-Based Underfill

Others

Segmentation by Application:

Cell Phone

Tablet

LCD Display

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Darbond Technology Co., Ltd.

Wuhan Choice Technology Co., Ltd.

Dongguan Hanstars New Material Technology Co., Ltd.

Shenzhen Dover Technology Co., Ltd.

SDKY New Material Technology Co., Ltd.

Henkel AG & Co. KGaA

NAMICS Corporation

Shin-Etsu Chemical Co., Ltd.

FUJI CHEMICAL INDUSTRIAL CO., LTD.

WON CHEMICAL Co., Ltd.

Panasonic Industry Co., Ltd.

Dexerials Corporation

Parker Hannifin Corporation (Parker LORD)

Element Solutions Inc (MacDermid Alpha Electronics Solutions)

AIM Solder

Zymet

A.I. Technology, Inc.

Master Bond Inc.

Bondline Electronic Adhesives, Inc.

Panacol-Elosol GmbH

Key Questions Addressed in this Report

What is the 10-year outlook for the global Chip On Film Underfill (COF) market?

What factors are driving Chip On Film Underfill (COF) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Chip On Film Underfill (COF) market opportunities vary by end market size?

How does Chip On Film Underfill (COF) break out by Type, by Application?

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