

Global Negative Thermal Expansion Filler Market Growth 2026-2032

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Abstracts

The global Negative Thermal Expansion Filler market size is predicted to grow from US\$ 78.46 million in 2025 to US\$ 114 million in 2032; it is expected to grow at a CAGR of 5.9% from 2026 to 2032.

Negative Thermal Expansion (NTE) fillers refer to materials that, within a specific temperature range, contract in volume or length as temperature rises and conversely expand when cooled? colloquially known as ?heat-shrinking, cold-expanding? materials. Through specific lattice vibrations or structural framework changes, these materials overcome the conventional ?thermal expansion and contraction? characteristics typical of most substances; they are primarily utilized in high-precision electronics, optical instruments, aerospace applications, and structural components to ensure dimensional stability.

The upstream segment of the NTE filler industry chain primarily involves inorganic raw materials?such as zirconium, tungsten, and phosphorus?along with their precursors, as well as equipment for the preparation and calcination of ultrafine powders. Typical NTE material systems include zirconium tungstates and zirconium phosphates. The midstream segment encompasses the synthesis of NTE powders, particle size and surface modification, dispersion and encapsulation, and the compounding of masterbatches; the core objective here is to achieve a balance among the coefficient of thermal expansion, particle size distribution, interfacial compatibility, and thermal and chemical resistance. The downstream segment focuses on applications within precision-intensive fields that demand exceptional dimensional stability, such as electronic packaging, aerospace engineering, and high-precision optical devices.

NTE fillers are classified as high value-added functional fillers, with a prevailing price

range of USD 80?300 per kilogram and an industry gross profit margin hovering around 20%?40%.

The negative thermal expansion (NTE) filler industry is, at its core, a specialized sector for functional fillers targeting high-end composite materials and electronic packaging applications. Its growth is fundamentally driven by persistent downstream demand for the precise control of thermal expansion coefficients, enhanced reliability under thermal cycling, and the mitigation of interfacial thermal stress. However, from the supply-side perspective, the industry remains significantly constrained by factors such as the maturity of material systems, production costs, batch-to-batch consistency, and the difficulty of formulation integration. For instance, NTE fillers from JX Advanced Metals are currently still in the corporate-led development phase. Consequently, it is unlikely that NTE fillers will achieve rapid volume scaling in the short term—as is common with ordinary inorganic fillers—making them better suited for gradual market penetration within high-value-added sectors such as aerospace and precision electronics.

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

This Insight Report provides a comprehensive analysis of the global Negative Thermal Expansion Filler 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 Negative Thermal Expansion Filler portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Negative Thermal Expansion Filler market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Negative Thermal Expansion Filler 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 Negative Thermal Expansion Filler.

This report presents a comprehensive overview, market shares, and growth opportunities of Negative Thermal Expansion Filler market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Zirconium Tungstate

Zirconium Tungsten Phosphate

Lithium Aluminum Silicate

Others

Segmentation by Thermal Expansion Characteristics:

Isotropic Negative Thermal Expansion Fillers

Anisotropic Negative Thermal Expansion Fillers

Others

Segmentation by Form:

Powder

Granules

Segmentation by Application:

Aerospace

Precision Optics

Microelectronics

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.

Toagosei

Nippon Electric Glass

Japan Material Technologies

Mitsui Kinzoku

Hunan Kela Materials

Key Questions Addressed in this Report

What is the 10-year outlook for the global Negative Thermal Expansion Filler market?

What factors are driving Negative Thermal Expansion Filler market growth, globally and by region?

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

How do Negative Thermal Expansion Filler market opportunities vary by end market size?

How does Negative Thermal Expansion Filler break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Negative Thermal Expansion Filler Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Negative Thermal Expansion Filler by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Negative Thermal Expansion Filler by Country/Region, 2021, 2025 & 2032
- 2.2 Negative Thermal Expansion Filler Segment by Type
 - 2.2.1 Zirconium Tungstate
 - 2.2.2 Zirconium Tungsten Phosphate
 - 2.2.3 Lithium Aluminum Silicate
 - 2.2.4 Others
 - 2.2.5 Negative Thermal Expansion Filler Sales by Type
 - 2.2.5.1 Global Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Negative Thermal Expansion Filler Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Negative Thermal Expansion Filler Sale Price by Type (2021-2026)
- 2.3 Negative Thermal Expansion Filler Segment by Thermal Expansion Characteristics
 - 2.3.1 Isotropic Negative Thermal Expansion Fillers
 - 2.3.2 Anisotropic Negative Thermal Expansion Fillers
 - 2.3.3 Others
 - 2.3.4 Negative Thermal Expansion Filler Sales by Thermal Expansion Characteristics
 - 2.3.4.1 Global Negative Thermal Expansion Filler Sales Market Share by Thermal Expansion Characteristics (2021-2026)

2.3.4.2 Global Negative Thermal Expansion Filler Revenue and Market Share by Thermal Expansion Characteristics (2021-2026)

2.3.4.3 Global Negative Thermal Expansion Filler Sale Price by Thermal Expansion Characteristics (2021-2026)

2.4 Negative Thermal Expansion Filler Segment by Form

2.4.1 Powder

2.4.2 Granules

2.4.3 Negative Thermal Expansion Filler Sales by Form

2.4.3.1 Global Negative Thermal Expansion Filler Sales Market Share by Form (2021-2026)

2.4.3.2 Global Negative Thermal Expansion Filler Revenue and Market Share by Form (2021-2026)

2.4.3.3 Global Negative Thermal Expansion Filler Sale Price by Form (2021-2026)

2.5 Negative Thermal Expansion Filler Segment by Application

2.5.1 Aerospace

2.5.2 Precision Optics

2.5.3 Microelectronics

2.5.4 Others

2.5.5 Negative Thermal Expansion Filler Sales by Application

2.5.5.1 Global Negative Thermal Expansion Filler Sale Market Share by Application (2021-2026)

2.5.5.2 Global Negative Thermal Expansion Filler Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Negative Thermal Expansion Filler Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Negative Thermal Expansion Filler Breakdown Data by Company

3.1.1 Global Negative Thermal Expansion Filler Annual Sales by Company (2021-2026)

3.1.2 Global Negative Thermal Expansion Filler Sales Market Share by Company (2021-2026)

3.2 Global Negative Thermal Expansion Filler Annual Revenue by Company (2021-2026)

3.2.1 Global Negative Thermal Expansion Filler Revenue by Company (2021-2026)

3.2.2 Global Negative Thermal Expansion Filler Revenue Market Share by Company (2021-2026)

3.3 Global Negative Thermal Expansion Filler Sale Price by Company

3.4 Key Manufacturers Negative Thermal Expansion Filler Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Negative Thermal Expansion Filler Product Location Distribution

3.4.2 Players Negative Thermal Expansion Filler Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NEGATIVE THERMAL EXPANSION FILLER BY GEOGRAPHIC REGION

4.1 World Historic Negative Thermal Expansion Filler Market Size by Geographic Region (2021-2026)

4.1.1 Global Negative Thermal Expansion Filler Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Negative Thermal Expansion Filler Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Negative Thermal Expansion Filler Market Size by Country/Region (2021-2026)

4.2.1 Global Negative Thermal Expansion Filler Annual Sales by Country/Region (2021-2026)

4.2.2 Global Negative Thermal Expansion Filler Annual Revenue by Country/Region (2021-2026)

4.3 Americas Negative Thermal Expansion Filler Sales Growth

4.4 APAC Negative Thermal Expansion Filler Sales Growth

4.5 Europe Negative Thermal Expansion Filler Sales Growth

4.6 Middle East & Africa Negative Thermal Expansion Filler Sales Growth

5 AMERICAS

5.1 Americas Negative Thermal Expansion Filler Sales by Country

5.1.1 Americas Negative Thermal Expansion Filler Sales by Country (2021-2026)

5.1.2 Americas Negative Thermal Expansion Filler Revenue by Country (2021-2026)

5.2 Americas Negative Thermal Expansion Filler Sales by Type (2021-2026)

5.3 Americas Negative Thermal Expansion Filler Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Negative Thermal Expansion Filler Sales by Region

6.1.1 APAC Negative Thermal Expansion Filler Sales by Region (2021-2026)

6.1.2 APAC Negative Thermal Expansion Filler Revenue by Region (2021-2026)

6.2 APAC Negative Thermal Expansion Filler Sales by Type (2021-2026)

6.3 APAC Negative Thermal Expansion Filler Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Negative Thermal Expansion Filler by Country

7.1.1 Europe Negative Thermal Expansion Filler Sales by Country (2021-2026)

7.1.2 Europe Negative Thermal Expansion Filler Revenue by Country (2021-2026)

7.2 Europe Negative Thermal Expansion Filler Sales by Type (2021-2026)

7.3 Europe Negative Thermal Expansion Filler Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Negative Thermal Expansion Filler by Country

8.1.1 Middle East & Africa Negative Thermal Expansion Filler Sales by Country (2021-2026)

8.1.2 Middle East & Africa Negative Thermal Expansion Filler Revenue by Country (2021-2026)

8.2 Middle East & Africa Negative Thermal Expansion Filler Sales by Type (2021-2026)

8.3 Middle East & Africa Negative Thermal Expansion Filler Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Negative Thermal Expansion Filler

10.3 Manufacturing Process Analysis of Negative Thermal Expansion Filler

10.4 Industry Chain Structure of Negative Thermal Expansion Filler

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Negative Thermal Expansion Filler Distributors

11.3 Negative Thermal Expansion Filler Customer

12 WORLD FORECAST REVIEW FOR NEGATIVE THERMAL EXPANSION FILLER BY GEOGRAPHIC REGION

12.1 Global Negative Thermal Expansion Filler Market Size Forecast by Region

12.1.1 Global Negative Thermal Expansion Filler Forecast by Region (2027-2032)

12.1.2 Global Negative Thermal Expansion Filler Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Negative Thermal Expansion Filler Forecast by Type (2027-2032)

12.7 Global Negative Thermal Expansion Filler Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Toagosei

13.1.1 Toagosei Company Information

13.1.2 Toagosei Negative Thermal Expansion Filler Product Portfolios and Specifications

13.1.3 Toagosei Negative Thermal Expansion Filler Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Toagosei Main Business Overview

13.1.5 Toagosei Latest Developments

13.2 Nippon Electric Glass

13.2.1 Nippon Electric Glass Company Information

13.2.2 Nippon Electric Glass Negative Thermal Expansion Filler Product Portfolios and Specifications

13.2.3 Nippon Electric Glass Negative Thermal Expansion Filler Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Nippon Electric Glass Main Business Overview

13.2.5 Nippon Electric Glass Latest Developments

13.3 Japan Material Technologies

13.3.1 Japan Material Technologies Company Information

13.3.2 Japan Material Technologies Negative Thermal Expansion Filler Product Portfolios and Specifications

13.3.3 Japan Material Technologies Negative Thermal Expansion Filler Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Japan Material Technologies Main Business Overview

13.3.5 Japan Material Technologies Latest Developments

13.4 Mitsui Kinzoku

13.4.1 Mitsui Kinzoku Company Information

13.4.2 Mitsui Kinzoku Negative Thermal Expansion Filler Product Portfolios and Specifications

13.4.3 Mitsui Kinzoku Negative Thermal Expansion Filler Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Mitsui Kinzoku Main Business Overview

13.4.5 Mitsui Kinzoku Latest Developments

13.5 Hunan Kela Materials

13.5.1 Hunan Kela Materials Company Information

13.5.2 Hunan Kela Materials Negative Thermal Expansion Filler Product Portfolios and Specifications

13.5.3 Hunan Kela Materials Negative Thermal Expansion Filler Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Hunan Kela Materials Main Business Overview

13.5.5 Hunan Kela Materials Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Negative Thermal Expansion Filler Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Negative Thermal Expansion Filler Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Zirconium Tungstate

Table 4. Major Players of Zirconium Tungsten Phosphate

Table 5. Major Players of Lithium Aluminum Silicate

Table 6. Major Players of Others

Table 7. Global Negative Thermal Expansion Filler Sales by Type (2021-2026) & (Tons)

Table 8. Global Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)

Table 9. Global Negative Thermal Expansion Filler Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Negative Thermal Expansion Filler Revenue Market Share by Type (2021-2026)

Table 11. Global Negative Thermal Expansion Filler Sale Price by Type (2021-2026) & (US\$/kg)

Table 12. Major Players of Isotropic Negative Thermal Expansion Fillers

Table 13. Major Players of Anisotropic Negative Thermal Expansion Fillers

Table 14. Major Players of Others

Table 15. Global Negative Thermal Expansion Filler Sales by Thermal Expansion Characteristics (2021-2026) & (Tons)

Table 16. Global Negative Thermal Expansion Filler Sales Market Share by Thermal Expansion Characteristics (2021-2026)

Table 17. Global Negative Thermal Expansion Filler Revenue by Thermal Expansion Characteristics (2021-2026) & (\$ million)

Table 18. Global Negative Thermal Expansion Filler Revenue Market Share by Thermal Expansion Characteristics (2021-2026)

Table 19. Global Negative Thermal Expansion Filler Sale Price by Thermal Expansion Characteristics (2021-2026) & (US\$/kg)

Table 20. Major Players of Powder

Table 21. Major Players of Granules

Table 22. Global Negative Thermal Expansion Filler Sales by Form (2021-2026) & (Tons)

Table 23. Global Negative Thermal Expansion Filler Sales Market Share by Form

(2021-2026)

Table 24. Global Negative Thermal Expansion Filler Revenue by Form (2021-2026) & (\$ million)

Table 25. Global Negative Thermal Expansion Filler Revenue Market Share by Form (2021-2026)

Table 26. Global Negative Thermal Expansion Filler Sale Price by Form (2021-2026) & (US\$/kg)

Table 27. Global Negative Thermal Expansion Filler Sale by Application (2021-2026) & (Tons)

Table 28. Global Negative Thermal Expansion Filler Sale Market Share by Application (2021-2026)

Table 29. Global Negative Thermal Expansion Filler Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Negative Thermal Expansion Filler Revenue Market Share by Application (2021-2026)

Table 31. Global Negative Thermal Expansion Filler Sale Price by Application (2021-2026) & (US\$/kg)

Table 32. Global Negative Thermal Expansion Filler Sales by Company (2021-2026) & (Tons)

Table 33. Global Negative Thermal Expansion Filler Sales Market Share by Company (2021-2026)

Table 34. Global Negative Thermal Expansion Filler Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Negative Thermal Expansion Filler Revenue Market Share by Company (2021-2026)

Table 36. Global Negative Thermal Expansion Filler Sale Price by Company (2021-2026) & (US\$/kg)

Table 37. Key Manufacturers Negative Thermal Expansion Filler Producing Area Distribution and Sales Area

Table 38. Players Negative Thermal Expansion Filler Products Offered

Table 39. Negative Thermal Expansion Filler Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Negative Thermal Expansion Filler Sales by Geographic Region (2021-2026) & (Tons)

Table 43. Global Negative Thermal Expansion Filler Sales Market Share Geographic Region (2021-2026)

Table 44. Global Negative Thermal Expansion Filler Revenue by Geographic Region

(2021-2026) & (\$ millions)

Table 45. Global Negative Thermal Expansion Filler Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Negative Thermal Expansion Filler Sales by Country/Region (2021-2026) & (Tons)

Table 47. Global Negative Thermal Expansion Filler Sales Market Share by Country/Region (2021-2026)

Table 48. Global Negative Thermal Expansion Filler Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Negative Thermal Expansion Filler Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Negative Thermal Expansion Filler Sales by Country (2021-2026) & (Tons)

Table 51. Americas Negative Thermal Expansion Filler Sales Market Share by Country (2021-2026)

Table 52. Americas Negative Thermal Expansion Filler Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Negative Thermal Expansion Filler Sales by Type (2021-2026) & (Tons)

Table 54. Americas Negative Thermal Expansion Filler Sales by Application (2021-2026) & (Tons)

Table 55. APAC Negative Thermal Expansion Filler Sales by Region (2021-2026) & (Tons)

Table 56. APAC Negative Thermal Expansion Filler Sales Market Share by Region (2021-2026)

Table 57. APAC Negative Thermal Expansion Filler Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Negative Thermal Expansion Filler Sales by Type (2021-2026) & (Tons)

Table 59. APAC Negative Thermal Expansion Filler Sales by Application (2021-2026) & (Tons)

Table 60. Europe Negative Thermal Expansion Filler Sales by Country (2021-2026) & (Tons)

Table 61. Europe Negative Thermal Expansion Filler Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Negative Thermal Expansion Filler Sales by Type (2021-2026) & (Tons)

Table 63. Europe Negative Thermal Expansion Filler Sales by Application (2021-2026) & (Tons)

Table 64. Middle East & Africa Negative Thermal Expansion Filler Sales by Country (2021-2026) & (Tons)

Table 65. Middle East & Africa Negative Thermal Expansion Filler Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Negative Thermal Expansion Filler Sales by Type (2021-2026) & (Tons)

Table 67. Middle East & Africa Negative Thermal Expansion Filler Sales by Application (2021-2026) & (Tons)

Table 68. Key Market Drivers & Growth Opportunities of Negative Thermal Expansion Filler

Table 69. Key Market Challenges & Risks of Negative Thermal Expansion Filler

Table 70. Key Industry Trends of Negative Thermal Expansion Filler

Table 71. Negative Thermal Expansion Filler Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Negative Thermal Expansion Filler Distributors List

Table 74. Negative Thermal Expansion Filler Customer List

Table 75. Global Negative Thermal Expansion Filler Sales Forecast by Region (2027-2032) & (Tons)

Table 76. Global Negative Thermal Expansion Filler Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Negative Thermal Expansion Filler Sales Forecast by Country (2027-2032) & (Tons)

Table 78. Americas Negative Thermal Expansion Filler Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Negative Thermal Expansion Filler Sales Forecast by Region (2027-2032) & (Tons)

Table 80. APAC Negative Thermal Expansion Filler Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Negative Thermal Expansion Filler Sales Forecast by Country (2027-2032) & (Tons)

Table 82. Europe Negative Thermal Expansion Filler Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Negative Thermal Expansion Filler Sales Forecast by Country (2027-2032) & (Tons)

Table 84. Middle East & Africa Negative Thermal Expansion Filler Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Negative Thermal Expansion Filler Sales Forecast by Type (2027-2032) & (Tons)

Table 86. Global Negative Thermal Expansion Filler Revenue Forecast by Type

(2027-2032) & (\$ millions)

Table 87. Global Negative Thermal Expansion Filler Sales Forecast by Application
(2027-2032) & (Tons)

Table 88. Global Negative Thermal Expansion Filler Revenue Forecast by Application
(2027-2032) & (\$ millions)

Table 89. Toagosei Basic Information, Negative Thermal Expansion Filler
Manufacturing Base, Sales Area and Its Competitors

Table 90. Toagosei Negative Thermal Expansion Filler Product Portfolios and
Specifications

Table 91. Toagosei Negative Thermal Expansion Filler Sales (Tons), Revenue (\$
Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 92. Toagosei Main Business

Table 93. Toagosei Latest Developments

Table 94. Nippon Electric Glass Basic Information, Negative Thermal Expansion Filler
Manufacturing Base, Sales Area and Its Competitors

Table 95. Nippon Electric Glass Negative Thermal Expansion Filler Product Portfolios
and Specifications

Table 96. Nippon Electric Glass Negative Thermal Expansion Filler Sales (Tons),
Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 97. Nippon Electric Glass Main Business

Table 98. Nippon Electric Glass Latest Developments

Table 99. Japan Material Technologies Basic Information, Negative Thermal Expansion
Filler Manufacturing Base, Sales Area and Its Competitors

Table 100. Japan Material Technologies Negative Thermal Expansion Filler Product
Portfolios and Specifications

Table 101. Japan Material Technologies Negative Thermal Expansion Filler Sales
(Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 102. Japan Material Technologies Main Business

Table 103. Japan Material Technologies Latest Developments

Table 104. Mitsui Kinzoku Basic Information, Negative Thermal Expansion Filler
Manufacturing Base, Sales Area and Its Competitors

Table 105. Mitsui Kinzoku Negative Thermal Expansion Filler Product Portfolios and
Specifications

Table 106. Mitsui Kinzoku Negative Thermal Expansion Filler Sales (Tons), Revenue (\$
Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 107. Mitsui Kinzoku Main Business

Table 108. Mitsui Kinzoku Latest Developments

Table 109. Hunan Kela Materials Basic Information, Negative Thermal Expansion Filler
Manufacturing Base, Sales Area and Its Competitors

Table 110. Hunan Kela Materials Negative Thermal Expansion Filler Product Portfolios and Specifications

Table 111. Hunan Kela Materials Negative Thermal Expansion Filler Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 112. Hunan Kela Materials Main Business

Table 113. Hunan Kela Materials Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Negative Thermal Expansion Filler
- Figure 2. Negative Thermal Expansion Filler Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Negative Thermal Expansion Filler Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Negative Thermal Expansion Filler Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Negative Thermal Expansion Filler Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Negative Thermal Expansion Filler Sales Market Share by Country/Region (2025)
- Figure 10. Negative Thermal Expansion Filler Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Zirconium Tungstate
- Figure 12. Product Picture of Zirconium Tungsten Phosphate
- Figure 13. Product Picture of Lithium Aluminum Silicate
- Figure 14. Product Picture of Others
- Figure 15. Global Negative Thermal Expansion Filler Sales Market Share by Type in 2026
- Figure 16. Global Negative Thermal Expansion Filler Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Isotropic Negative Thermal Expansion Fillers
- Figure 18. Product Picture of Anisotropic Negative Thermal Expansion Fillers
- Figure 19. Product Picture of Others
- Figure 20. Global Negative Thermal Expansion Filler Sales Market Share by Thermal Expansion Characteristics in 2026
- Figure 21. Global Negative Thermal Expansion Filler Revenue Market Share by Thermal Expansion Characteristics (2021-2026)
- Figure 22. Product Picture of Powder
- Figure 23. Product Picture of Granules
- Figure 24. Global Negative Thermal Expansion Filler Sales Market Share by Form in 2026
- Figure 25. Global Negative Thermal Expansion Filler Revenue Market Share by Form

(2021-2026)

Figure 26. Negative Thermal Expansion Filler Consumed in Aerospace

Figure 27. Global Negative Thermal Expansion Filler Market: Aerospace (2021-2026) & (Tons)

Figure 28. Negative Thermal Expansion Filler Consumed in Precision Optics

Figure 29. Global Negative Thermal Expansion Filler Market: Precision Optics (2021-2026) & (Tons)

Figure 30. Negative Thermal Expansion Filler Consumed in Microelectronics

Figure 31. Global Negative Thermal Expansion Filler Market: Microelectronics (2021-2026) & (Tons)

Figure 32. Negative Thermal Expansion Filler Consumed in Others

Figure 33. Global Negative Thermal Expansion Filler Market: Others (2021-2026) & (Tons)

Figure 34. Global Negative Thermal Expansion Filler Sale Market Share by Application (2025)

Figure 35. Global Negative Thermal Expansion Filler Revenue Market Share by Application in 2025

Figure 36. Negative Thermal Expansion Filler Sales by Company in 2025 (Tons)

Figure 37. Global Negative Thermal Expansion Filler Sales Market Share by Company in 2025

Figure 38. Negative Thermal Expansion Filler Revenue by Company in 2025 (\$ millions)

Figure 39. Global Negative Thermal Expansion Filler Revenue Market Share by Company in 2025

Figure 40. Global Negative Thermal Expansion Filler Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global Negative Thermal Expansion Filler Revenue Market Share by Geographic Region in 2025

Figure 42. Americas Negative Thermal Expansion Filler Sales 2021-2026 (Tons)

Figure 43. Americas Negative Thermal Expansion Filler Revenue 2021-2026 (\$ millions)

Figure 44. APAC Negative Thermal Expansion Filler Sales 2021-2026 (Tons)

Figure 45. APAC Negative Thermal Expansion Filler Revenue 2021-2026 (\$ millions)

Figure 46. Europe Negative Thermal Expansion Filler Sales 2021-2026 (Tons)

Figure 47. Europe Negative Thermal Expansion Filler Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa Negative Thermal Expansion Filler Sales 2021-2026 (Tons)

Figure 49. Middle East & Africa Negative Thermal Expansion Filler Revenue 2021-2026 (\$ millions)

Figure 50. Americas Negative Thermal Expansion Filler Sales Market Share by Country in 2025

Figure 51. Americas Negative Thermal Expansion Filler Revenue Market Share by Country (2021-2026)

Figure 52. Americas Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)

Figure 53. Americas Negative Thermal Expansion Filler Sales Market Share by Application (2021-2026)

Figure 54. United States Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC Negative Thermal Expansion Filler Sales Market Share by Region in 2025

Figure 59. APAC Negative Thermal Expansion Filler Revenue Market Share by Region (2021-2026)

Figure 60. APAC Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)

Figure 61. APAC Negative Thermal Expansion Filler Sales Market Share by Application (2021-2026)

Figure 62. China Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 66. India Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe Negative Thermal Expansion Filler Sales Market Share by Country in 2025

Figure 70. Europe Negative Thermal Expansion Filler Revenue Market Share by

Country (2021-2026)

Figure 71. Europe Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)

Figure 72. Europe Negative Thermal Expansion Filler Sales Market Share by Application (2021-2026)

Figure 73. Germany Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 74. France Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa Negative Thermal Expansion Filler Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa Negative Thermal Expansion Filler Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa Negative Thermal Expansion Filler Sales Market Share by Application (2021-2026)

Figure 81. Egypt Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 85. GCC Countries Negative Thermal Expansion Filler Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of Negative Thermal Expansion Filler in 2026

Figure 87. Manufacturing Process Analysis of Negative Thermal Expansion Filler

Figure 88. Industry Chain Structure of Negative Thermal Expansion Filler

Figure 89. Channels of Distribution

Figure 90. Global Negative Thermal Expansion Filler Sales Market Forecast by Region (2027-2032)

Figure 91. Global Negative Thermal Expansion Filler Revenue Market Share Forecast

by Region (2027-2032)

Figure 92. Global Negative Thermal Expansion Filler Sales Market Share Forecast by Type (2027-2032)

Figure 93. Global Negative Thermal Expansion Filler Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global Negative Thermal Expansion Filler Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global Negative Thermal Expansion Filler Revenue Market Share Forecast by Application (2027-2032)

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