

Global Non-conductive Film for Advanced Packaging Market Growth 2026-2032

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Abstracts

The global Non-conductive Film for Advanced Packaging market size is predicted to grow from US\$ 284 million in 2025 to US\$ 671 million in 2032; it is expected to grow at a CAGR of 13.0% from 2026 to 2032.

Non-conductive film for advanced packaging is a pre-formed insulating adhesive film that fills the narrow gap between a die and substrate during flip-chip or thermo-compression bonding and then flows, cures and locks the joints under heat and pressure. It must combine low voiding, fast cure, controlled flow, low thermal expansion, bump penetration and high-temperature/high-humidity reliability for HBM, fine-pitch flip chip, chiplets and fan-out packaging. In 2025, global Non-conductive Film for Advanced Packaging production reached approximately 12.0 K MT.

Higher HBM stack counts and shrinking micro-bump pitch make conventional capillary underfill more difficult because of long flow paths and void control, supporting NCF adoption in thermo-compression bonding. Pre-applied films can shorten process flow and improve thickness uniformity.

Next-generation NCF must fill and cure under lower bonding pressure and shorter cycle time while avoiding die warpage, filler entrapment and open joints. Resin rheology, filler particle size and latent-curing-agent design are central development areas.

The market is tightly coupled with bonding equipment and package process integration, requiring suppliers to participate in early customer development. AI accelerators and HBM capacity expansion support double-digit growth, while qualification, yield responsibility and dedicated production investment create high entry barriers.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Non-conductive Film for Advanced Packaging 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 Non-conductive Film for Advanced Packaging portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Non-conductive Film for Advanced Packaging market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-conductive Film for Advanced Packaging 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 Non-conductive Film for Advanced Packaging.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-conductive Film for Advanced Packaging market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Epoxy-Based NCF

Acrylic-Based NCF

Bismaleimide-Based NCF

Hybrid Resin NCF

Other

Segmentation by Filler Content:

Low-Filled NCF

Filler-Free NCF

Other

Segmentation by Cure Mechanism:

Thermosetting NCF

Dual-Cure NCF

UV-Assisted NCF

Other

Segmentation by Application:

Thermo-Compression Bonding for HBM

Fine-Pitch Flip-Chip Packaging

Chiplets and 2.5D Integration

Fan-Out Packaging

Other

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.

Resonac

Henkel

NAMICS

Nagase ChemteX

Samsung SDI

Sekisui Chemical

Dexerials

WaferChem

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-conductive Film for Advanced Packaging market?

What factors are driving Non-conductive Film for Advanced Packaging market growth, globally and by region?

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

How do Non-conductive Film for Advanced Packaging market opportunities vary by end market size?

How does Non-conductive Film for Advanced Packaging break out by Type, by Application?

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