

Global Non-Conductive Film(NCF) Market Growth 2026-2032

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Abstracts

The global Non-Conductive Film(NCF) market size is predicted to grow from US\$ 14.55 million in 2025 to US\$ 66.58 million in 2032; it is expected to grow at a CAGR of 21.1% from 2026 to 2032.

Non-Conductive Film (NCF) is a film-type insulating adhesive material used in advanced semiconductor packaging. It is typically pre-applied or laminated at the interface before bonding between a chip, wafer, or substrate, and provides adhesion, gap filling, electrical insulation, and protection during processes such as thermal compression bonding. NCF itself does not conduct electrical current; electrical connection is mainly achieved through metal interconnect structures such as micro-bumps, copper pillars, or solder bumps. The core function of NCF is to form a stable non-conductive support layer around these interconnect structures, thereby reducing failure risks such as voiding, short circuits, warpage, interfacial delamination, and thermomechanical stress. Compared with conventional liquid underfill materials, NCF offers better control over film thickness and placement accuracy, and is well suited for narrow-gap and fine-pitch packaging structures. It can also reduce process uncertainty associated with subsequent dispensing and capillary flow.

NCF is a key functional film material within the advanced packaging materials value chain. It is mainly used in flip-chip packaging, wafer-level packaging, three-dimensional stacking, TSV memory, high-bandwidth memory, and high-density heterogeneous integration. As demand for high-bandwidth memory, 2.5D packaging, and 3D packaging grows rapidly in AI servers, HPC systems, data centers, and high-end GPUs, packaging structures are subject to increasingly stringent requirements for interlayer gaps, bump protection, thermal compression process windows, low-void filling, and long-term reliability. This has driven NCF to evolve from a niche category within general electronic

adhesive materials into a key material for advanced packaging. In terms of technology development, NCF is moving toward thinner film thickness, lower void rates, greater adaptability to narrow process windows, higher thermomechanical reliability, and closer co-optimization with thermal compression bonding equipment. Public information from Samsung shows that its HBM3E 12H uses advanced Thermal Compression Non-Conductive Film (TC NCF), enabling a 12-layer product to maintain a height specification close to that of an 8-layer product while improving packaging performance by reducing interlayer gaps. Samsung's technical materials also indicate that TC NCF can effectively fill stacked bonding gaps and reduce voids that affect thermal performance. From a market perspective, NCF remains a specialized materials market with a relatively small scale but rapid growth. The number of qualified suppliers is limited, downstream customer qualification cycles are long, and sales are typically not conducted as general spot transactions. Instead, products are usually introduced after customized validation around specific packaging structures, film thickness, flow behavior, curing windows, and reliability data.

The upstream market for NCF mainly includes resin matrices, curing agents, functional fillers, release films, coating substrates, precision coating equipment, clean rewinding, and quality inspection systems. Its cost structure and supply stability are significantly affected by high-purity chemicals, electronic-grade resins, filler particle-size control, film-thickness uniformity, and clean manufacturing capability. Midstream enterprises are responsible for formulation design, coating, lamination, slitting, packaging, and customer qualification. The core industry barriers lie in formulation know-how, batch-to-batch consistency, low-defect production, and coordination with thermal compression bonding processes. Downstream customers mainly include memory manufacturers, advanced packaging houses, IDMs, and OSATs, and demand is directly driven by the capacity expansion of HBM, AI accelerators, advanced logic chips, and heterogeneous integration. At the policy level, both domestic and overseas markets are strengthening advanced packaging and semiconductor materials ecosystems. China's National Integrated Circuit Industry Development Promotion Outline calls for the development of advanced packaging and testing technologies and supports integrated circuit manufacturing, packaging and testing, equipment, and materials through industrial funds and tax incentives. Internationally, the United States regards advanced packaging capability as an important component of the semiconductor manufacturing system. NIST's National Advanced Packaging Manufacturing Program emphasizes that investment in advanced packaging is important to the success of the semiconductor industry and promotes domestic supply-chain capability through advanced packaging R&D and pilot facilities. These policies do not directly determine sales of a single NCF product, but they can indirectly enhance the strategic position of high-reliability

packaging films by expanding advanced packaging R&D, pilot production, and localized supply-chain demand.

In the future, the price, output, and market size of NCF are likely to follow a pattern in which prices for high-end specifications remain resilient, unit costs gradually decline with capacity expansion, and total demand continues to grow. In terms of pricing, because NCF must meet requirements for fine pitch, high stacking, low voiding, and high reliability, and because it must pass stringent customer qualification processes, high-end products used in HBM and 3D packaging are unlikely to become commoditized rapidly in the short term. Their prices will continue to reflect premiums associated with formulation capability, yield performance, reliability data, and supply assurance. However, as leading materials suppliers expand production, processes mature, and yields improve, unit prices for standard specifications or mature packaging applications may gradually stabilize. In terms of output, the expansion of AI chips, HBM3E, HBM4, and advanced packaging capacity will increase NCF shipments. Overall, future NCF growth will depend on higher HBM stack counts, wider adoption of thermal compression bonding, and rising demand for localized advanced packaging materials. At the same time, NCF must also compete with alternative routes such as MR-MUF, NCP, liquid underfill, and hybrid bonding. Therefore, its long-term market potential will be jointly determined by performance reliability, cost efficiency, and the pace at which downstream customers introduce it into mass production.

LP Information, Inc. (LPI) ' newest research report, the ?Non-Conductive Film(NCF) Industry Forecast? looks at past sales and reviews total world Non-Conductive Film(NCF) sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-Conductive Film(NCF) sales for 2026 through 2032. With Non-Conductive Film(NCF) 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(NCF) industry.

This Insight Report provides a comprehensive analysis of the global Non-Conductive Film(NCF) 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(NCF) 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(NCF) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Non-Conductive Film(NCF) and breaks down the forecast by Resin Matrix, 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(NCF).

This report presents a comprehensive overview, market shares, and growth opportunities of Non-Conductive Film(NCF) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Resin Matrix:

Epoxy-Based NCF

Acrylic-Based NCF

Other

Segmentation by Pre-Applied Position:

Wafer-Applied NCF

Substrate-Applied NCF

Segmentation by Bonding Process:

Thermal Compression Bonding NCF

Other Specialized Bonding NCF

Segmentation by Supply Form:

Roll-Form NCF

Sheet-Form NCF

Other

Segmentation by Application:

Die-To-Die Stacking

Die-To-Wafer Bonding

Die-To-Substrate Interconnect

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 Corporation

LG Chem

Henkel

Nopion

Ultra-Pak Industries

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-Conductive Film(NCF) market?

What factors are driving Non-Conductive Film(NCF) market growth, globally and by region?

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

How do Non-Conductive Film(NCF) market opportunities vary by end market size?

How does Non-Conductive Film(NCF) break out by Resin Matrix, by Application?

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