

Global TC NCF Market Growth 2026-2032

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Abstracts

The global TC NCF market size is predicted to grow from US\$ 7.64 million in 2025 to US\$ 39.36 million in 2032; it is expected to grow at a CAGR of 21.0% from 2026 to 2032.

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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for TC NCF and breaks down the forecast by Package Generation Positioning, 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 TC NCF.

This report presents a comprehensive overview, market shares, and growth opportunities of TC NCF market by product type, application, key manufacturers and key regions and countries.

Segmentation 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

Segmentation by Product Physical Form:

Roll-form TC NCF

Sheet-form TC NCF

Other

Segmentation by Dielectric Performance Positioning:

Low-Dielectric TC NCF

Standard-Insulation TC NCF

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

ADEKA

Henkel AG & Co. KGaA

LG Chem

Nopion

U-PAK

Key Questions Addressed in this Report

What is the 10-year outlook for the global TC NCF market?

What factors are driving TC NCF market growth, globally and by region?

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

How do TC NCF market opportunities vary by end market size?

How does TC NCF break out by Package Generation Positioning, 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 TC NCF Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for TC NCF by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for TC NCF by Country/Region, 2021, 2025 & 2032

2.2 TC NCF Segment by Package Generation Positioning

2.2.1 TC NCF For HBM3E And Above Packaging

2.2.2 Regular TC NCF For General HBM And TSV Packaging

2.2.3 TC NCF For General Advanced Packaging

2.2.4 TC NCF Sales by Package Generation Positioning

2.2.4.1 Global TC NCF Sales Market Share by Package Generation Positioning (2021-2026)

2.2.4.2 Global TC NCF Revenue and Market Share by Package Generation Positioning (2021-2026)

2.2.4.3 Global TC NCF Sale Price by Package Generation Positioning (2021-2026)

2.3 TC NCF Segment by Product Physical Form

2.3.1 Roll-form TC NCF

2.3.2 Sheet-form TC NCF

2.3.3 Other

2.3.4 TC NCF Sales by Product Physical Form

2.3.4.1 Global TC NCF Sales Market Share by Product Physical Form (2021-2026)

2.3.4.2 Global TC NCF Revenue and Market Share by Product Physical Form (2021-2026)

- 2.3.4.3 Global TC NCF Sale Price by Product Physical Form (2021-2026)
- 2.4 TC NCF Segment by Dielectric Performance Positioning
 - 2.4.1 Low-Dielectric TC NCF
 - 2.4.2 Standard-Insulation TC NCF
 - 2.4.3 TC NCF Sales by Dielectric Performance Positioning
 - 2.4.3.1 Global TC NCF Sales Market Share by Dielectric Performance Positioning (2021-2026)
 - 2.4.3.2 Global TC NCF Revenue and Market Share by Dielectric Performance Positioning (2021-2026)
 - 2.4.3.3 Global TC NCF Sale Price by Dielectric Performance Positioning (2021-2026)
- 2.5 TC NCF Segment by Application
 - 2.5.1 Die-To-Die Stacking
 - 2.5.2 Die-To-Wafer Bonding
 - 2.5.3 Die-To-Substrate Interconnect
 - 2.5.4 TC NCF Sales by Application
 - 2.5.4.1 Global TC NCF Sale Market Share by Application (2021-2026)
 - 2.5.4.2 Global TC NCF Revenue and Market Share by Application (2021-2026)
 - 2.5.4.3 Global TC NCF Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global TC NCF Breakdown Data by Company
 - 3.1.1 Global TC NCF Annual Sales by Company (2021-2026)
 - 3.1.2 Global TC NCF Sales Market Share by Company (2021-2026)
- 3.2 Global TC NCF Annual Revenue by Company (2021-2026)
 - 3.2.1 Global TC NCF Revenue by Company (2021-2026)
 - 3.2.2 Global TC NCF Revenue Market Share by Company (2021-2026)
- 3.3 Global TC NCF Sale Price by Company
- 3.4 Key Manufacturers TC NCF Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers TC NCF Product Location Distribution
 - 3.4.2 Players TC NCF 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 TC NCF BY GEOGRAPHIC REGION

- 4.1 World Historic TC NCF Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global TC NCF Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global TC NCF Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic TC NCF Market Size by Country/Region (2021-2026)
 - 4.2.1 Global TC NCF Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global TC NCF Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas TC NCF Sales Growth
- 4.4 APAC TC NCF Sales Growth
- 4.5 Europe TC NCF Sales Growth
- 4.6 Middle East & Africa TC NCF Sales Growth

5 AMERICAS

- 5.1 Americas TC NCF Sales by Country
 - 5.1.1 Americas TC NCF Sales by Country (2021-2026)
 - 5.1.2 Americas TC NCF Revenue by Country (2021-2026)
- 5.2 Americas TC NCF Sales by Package Generation Positioning (2021-2026)
- 5.3 Americas TC NCF Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC TC NCF Sales by Region
 - 6.1.1 APAC TC NCF Sales by Region (2021-2026)
 - 6.1.2 APAC TC NCF Revenue by Region (2021-2026)
- 6.2 APAC TC NCF Sales by Package Generation Positioning (2021-2026)
- 6.3 APAC TC NCF 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 TC NCF by Country

7.1.1 Europe TC NCF Sales by Country (2021-2026)

7.1.2 Europe TC NCF Revenue by Country (2021-2026)

7.2 Europe TC NCF Sales by Package Generation Positioning (2021-2026)

7.3 Europe TC NCF 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 TC NCF by Country

8.1.1 Middle East & Africa TC NCF Sales by Country (2021-2026)

8.1.2 Middle East & Africa TC NCF Revenue by Country (2021-2026)

8.2 Middle East & Africa TC NCF Sales by Package Generation Positioning (2021-2026)

8.3 Middle East & Africa TC NCF 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 TC NCF

10.3 Manufacturing Process Analysis of TC NCF

10.4 Industry Chain Structure of TC NCF

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 TC NCF Distributors

11.3 TC NCF Customer

12 WORLD FORECAST REVIEW FOR TC NCF BY GEOGRAPHIC REGION

12.1 Global TC NCF Market Size Forecast by Region

12.1.1 Global TC NCF Forecast by Region (2027-2032)

12.1.2 Global TC NCF 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 TC NCF Forecast by Package Generation Positioning (2027-2032)

12.7 Global TC NCF Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Resonac

13.1.1 Resonac Company Information

13.1.2 Resonac TC NCF Product Portfolios and Specifications

13.1.3 Resonac TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Resonac Main Business Overview

13.1.5 Resonac Latest Developments

13.2 ADEKA

13.2.1 ADEKA Company Information

13.2.2 ADEKA TC NCF Product Portfolios and Specifications

13.2.3 ADEKA TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 ADEKA Main Business Overview

13.2.5 ADEKA Latest Developments

13.3 Henkel AG & Co. KGaA

13.3.1 Henkel AG & Co. KGaA Company Information

13.3.2 Henkel AG & Co. KGaA TC NCF Product Portfolios and Specifications

13.3.3 Henkel AG & Co. KGaA TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Henkel AG & Co. KGaA Main Business Overview

13.3.5 Henkel AG & Co. KGaA Latest Developments

13.4 LG Chem

13.4.1 LG Chem Company Information

13.4.2 LG Chem TC NCF Product Portfolios and Specifications

13.4.3 LG Chem TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 LG Chem Main Business Overview

13.4.5 LG Chem Latest Developments

13.5 Nopion

13.5.1 Nopion Company Information

13.5.2 Nopion TC NCF Product Portfolios and Specifications

13.5.3 Nopion TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Nopion Main Business Overview

13.5.5 Nopion Latest Developments

13.6 U-PAK

13.6.1 U-PAK Company Information

13.6.2 U-PAK TC NCF Product Portfolios and Specifications

13.6.3 U-PAK TC NCF Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 U-PAK Main Business Overview

13.6.5 U-PAK Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. TC NCF Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. TC NCF Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of TC NCF For HBM3E And Above Packaging

Table 4. Major Players of Regular TC NCF For General HBM And TSV Packaging

Table 5. Major Players of TC NCF For General Advanced Packaging

Table 6. Global TC NCF Sales by Package Generation Positioning (2021-2026) & (K Sqm)

Table 7. Global TC NCF Sales Market Share by Package Generation Positioning (2021-2026)

Table 8. Global TC NCF Revenue by Package Generation Positioning (2021-2026) & (\$ million)

Table 9. Global TC NCF Revenue Market Share by Package Generation Positioning (2021-2026)

Table 10. Global TC NCF Sale Price by Package Generation Positioning (2021-2026) & (US\$/Sq m)

Table 11. Major Players of Roll-form TC NCF

Table 12. Major Players of Sheet-form TC NCF

Table 13. Major Players of Other

Table 14. Global TC NCF Sales by Product Physical Form (2021-2026) & (K Sqm)

Table 15. Global TC NCF Sales Market Share by Product Physical Form (2021-2026)

Table 16. Global TC NCF Revenue by Product Physical Form (2021-2026) & (\$ million)

Table 17. Global TC NCF Revenue Market Share by Product Physical Form (2021-2026)

Table 18. Global TC NCF Sale Price by Product Physical Form (2021-2026) & (US\$/Sq m)

Table 19. Major Players of Low-Dielectric TC NCF

Table 20. Major Players of Standard-Insulation TC NCF

Table 21. Global TC NCF Sales by Dielectric Performance Positioning (2021-2026) & (K Sqm)

Table 22. Global TC NCF Sales Market Share by Dielectric Performance Positioning (2021-2026)

Table 23. Global TC NCF Revenue by Dielectric Performance Positioning (2021-2026) & (\$ million)

Table 24. Global TC NCF Revenue Market Share by Dielectric Performance Positioning (2021-2026)

Table 25. Global TC NCF Sale Price by Dielectric Performance Positioning (2021-2026) & (US\$/Sq m)

Table 26. Global TC NCF Sale by Application (2021-2026) & (K Sqm)

Table 27. Global TC NCF Sale Market Share by Application (2021-2026)

Table 28. Global TC NCF Revenue by Application (2021-2026) & (\$ million)

Table 29. Global TC NCF Revenue Market Share by Application (2021-2026)

Table 30. Global TC NCF Sale Price by Application (2021-2026) & (US\$/Sq m)

Table 31. Global TC NCF Sales by Company (2021-2026) & (K Sqm)

Table 32. Global TC NCF Sales Market Share by Company (2021-2026)

Table 33. Global TC NCF Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global TC NCF Revenue Market Share by Company (2021-2026)

Table 35. Global TC NCF Sale Price by Company (2021-2026) & (US\$/Sq m)

Table 36. Key Manufacturers TC NCF Producing Area Distribution and Sales Area

Table 37. Players TC NCF Products Offered

Table 38. TC NCF Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global TC NCF Sales by Geographic Region (2021-2026) & (K Sqm)

Table 42. Global TC NCF Sales Market Share Geographic Region (2021-2026)

Table 43. Global TC NCF Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global TC NCF Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global TC NCF Sales by Country/Region (2021-2026) & (K Sqm)

Table 46. Global TC NCF Sales Market Share by Country/Region (2021-2026)

Table 47. Global TC NCF Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global TC NCF Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas TC NCF Sales by Country (2021-2026) & (K Sqm)

Table 50. Americas TC NCF Sales Market Share by Country (2021-2026)

Table 51. Americas TC NCF Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas TC NCF Sales by Package Generation Positioning (2021-2026) & (K Sqm)

Table 53. Americas TC NCF Sales by Application (2021-2026) & (K Sqm)

Table 54. APAC TC NCF Sales by Region (2021-2026) & (K Sqm)

Table 55. APAC TC NCF Sales Market Share by Region (2021-2026)

Table 56. APAC TC NCF Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC TC NCF Sales by Package Generation Positioning (2021-2026) & (K Sqm)

Table 58. APAC TC NCF Sales by Application (2021-2026) & (K Sqm)

Table 59. Europe TC NCF Sales by Country (2021-2026) & (K Sqm)
Table 60. Europe TC NCF Revenue by Country (2021-2026) & (\$ millions)
Table 61. Europe TC NCF Sales by Package Generation Positioning (2021-2026) & (K Sqm)
Table 62. Europe TC NCF Sales by Application (2021-2026) & (K Sqm)
Table 63. Middle East & Africa TC NCF Sales by Country (2021-2026) & (K Sqm)
Table 64. Middle East & Africa TC NCF Revenue Market Share by Country (2021-2026)
Table 65. Middle East & Africa TC NCF Sales by Package Generation Positioning (2021-2026) & (K Sqm)
Table 66. Middle East & Africa TC NCF Sales by Application (2021-2026) & (K Sqm)
Table 67. Key Market Drivers & Growth Opportunities of TC NCF
Table 68. Key Market Challenges & Risks of TC NCF
Table 69. Key Industry Trends of TC NCF
Table 70. TC NCF Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. TC NCF Distributors List
Table 73. TC NCF Customer List
Table 74. Global TC NCF Sales Forecast by Region (2027-2032) & (K Sqm)
Table 75. Global TC NCF Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 76. Americas TC NCF Sales Forecast by Country (2027-2032) & (K Sqm)
Table 77. Americas TC NCF Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 78. APAC TC NCF Sales Forecast by Region (2027-2032) & (K Sqm)
Table 79. APAC TC NCF Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
Table 80. Europe TC NCF Sales Forecast by Country (2027-2032) & (K Sqm)
Table 81. Europe TC NCF Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 82. Middle East & Africa TC NCF Sales Forecast by Country (2027-2032) & (K Sqm)
Table 83. Middle East & Africa TC NCF Revenue Forecast by Country (2027-2032) & (\$ millions)
Table 84. Global TC NCF Sales Forecast by Package Generation Positioning (2027-2032) & (K Sqm)
Table 85. Global TC NCF Revenue Forecast by Package Generation Positioning (2027-2032) & (\$ millions)
Table 86. Global TC NCF Sales Forecast by Application (2027-2032) & (K Sqm)
Table 87. Global TC NCF Revenue Forecast by Application (2027-2032) & (\$ millions)
Table 88. Resonac Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors

Table 89. Resonac TC NCF Product Portfolios and Specifications
Table 90. Resonac TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 91. Resonac Main Business
Table 92. Resonac Latest Developments
Table 93. ADEKA Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors
Table 94. ADEKA TC NCF Product Portfolios and Specifications
Table 95. ADEKA TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 96. ADEKA Main Business
Table 97. ADEKA Latest Developments
Table 98. Henkel AG & Co. KGaA Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors
Table 99. Henkel AG & Co. KGaA TC NCF Product Portfolios and Specifications
Table 100. Henkel AG & Co. KGaA TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 101. Henkel AG & Co. KGaA Main Business
Table 102. Henkel AG & Co. KGaA Latest Developments
Table 103. LG Chem Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors
Table 104. LG Chem TC NCF Product Portfolios and Specifications
Table 105. LG Chem TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 106. LG Chem Main Business
Table 107. LG Chem Latest Developments
Table 108. Nopion Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors
Table 109. Nopion TC NCF Product Portfolios and Specifications
Table 110. Nopion TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 111. Nopion Main Business
Table 112. Nopion Latest Developments
Table 113. U-PAK Basic Information, TC NCF Manufacturing Base, Sales Area and Its Competitors
Table 114. U-PAK TC NCF Product Portfolios and Specifications
Table 115. U-PAK TC NCF Sales (K Sqm), Revenue (\$ Million), Price (US\$/Sq m) and Gross Margin (2021-2026)
Table 116. U-PAK Main Business

Table 117. U-PAK Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of TC NCF
- Figure 2. TC NCF Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global TC NCF Sales Growth Rate 2021-2032 (K Sqm)
- Figure 7. Global TC NCF Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. TC NCF Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. TC NCF Sales Market Share by Country/Region (2025)
- Figure 10. TC NCF Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of TC NCF For HBM3E And Above Packaging
- Figure 12. Product Picture of Regular TC NCF For General HBM And TSV Packaging
- Figure 13. Product Picture of TC NCF For General Advanced Packaging
- Figure 14. Global TC NCF Sales Market Share by Package Generation Positioning in 2026
- Figure 15. Global TC NCF Revenue Market Share by Package Generation Positioning (2021-2026)
- Figure 16. Product Picture of Roll-form TC NCF
- Figure 17. Product Picture of Sheet-form TC NCF
- Figure 18. Product Picture of Other
- Figure 19. Global TC NCF Sales Market Share by Product Physical Form in 2026
- Figure 20. Global TC NCF Revenue Market Share by Product Physical Form (2021-2026)
- Figure 21. Product Picture of Low-Dielectric TC NCF
- Figure 22. Product Picture of Standard-Insulation TC NCF
- Figure 23. Global TC NCF Sales Market Share by Dielectric Performance Positioning in 2026
- Figure 24. Global TC NCF Revenue Market Share by Dielectric Performance Positioning (2021-2026)
- Figure 25. TC NCF Consumed in Die-To-Die Stacking
- Figure 26. Global TC NCF Market: Die-To-Die Stacking (2021-2026) & (K Sqm)
- Figure 27. TC NCF Consumed in Die-To-Wafer Bonding
- Figure 28. Global TC NCF Market: Die-To-Wafer Bonding (2021-2026) & (K Sqm)
- Figure 29. TC NCF Consumed in Die-To-Substrate Interconnect
- Figure 30. Global TC NCF Market: Die-To-Substrate Interconnect (2021-2026) & (K

Sqm)

Figure 31. Global TC NCF Sale Market Share by Application (2025)

Figure 32. Global TC NCF Revenue Market Share by Application in 2025

Figure 33. TC NCF Sales by Company in 2025 (K Sqm)

Figure 34. Global TC NCF Sales Market Share by Company in 2025

Figure 35. TC NCF Revenue by Company in 2025 (\$ millions)

Figure 36. Global TC NCF Revenue Market Share by Company in 2025

Figure 37. Global TC NCF Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global TC NCF Revenue Market Share by Geographic Region in 2025

Figure 39. Americas TC NCF Sales 2021-2026 (K Sqm)

Figure 40. Americas TC NCF Revenue 2021-2026 (\$ millions)

Figure 41. APAC TC NCF Sales 2021-2026 (K Sqm)

Figure 42. APAC TC NCF Revenue 2021-2026 (\$ millions)

Figure 43. Europe TC NCF Sales 2021-2026 (K Sqm)

Figure 44. Europe TC NCF Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa TC NCF Sales 2021-2026 (K Sqm)

Figure 46. Middle East & Africa TC NCF Revenue 2021-2026 (\$ millions)

Figure 47. Americas TC NCF Sales Market Share by Country in 2025

Figure 48. Americas TC NCF Revenue Market Share by Country (2021-2026)

Figure 49. Americas TC NCF Sales Market Share by Package Generation Positioning (2021-2026)

Figure 50. Americas TC NCF Sales Market Share by Application (2021-2026)

Figure 51. United States TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC TC NCF Sales Market Share by Region in 2025

Figure 56. APAC TC NCF Revenue Market Share by Region (2021-2026)

Figure 57. APAC TC NCF Sales Market Share by Package Generation Positioning (2021-2026)

Figure 58. APAC TC NCF Sales Market Share by Application (2021-2026)

Figure 59. China TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 63. India TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan TC NCF Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe TC NCF Sales Market Share by Country in 2025

- Figure 67. Europe TC NCF Revenue Market Share by Country (2021-2026)
- Figure 68. Europe TC NCF Sales Market Share by Package Generation Positioning (2021-2026)
- Figure 69. Europe TC NCF Sales Market Share by Application (2021-2026)
- Figure 70. Germany TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 71. France TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 72. UK TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 73. Italy TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 74. Russia TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 75. Middle East & Africa TC NCF Sales Market Share by Country (2021-2026)
- Figure 76. Middle East & Africa TC NCF Sales Market Share by Package Generation Positioning (2021-2026)
- Figure 77. Middle East & Africa TC NCF Sales Market Share by Application (2021-2026)
- Figure 78. Egypt TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 79. South Africa TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 80. Israel TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 81. Turkey TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 82. GCC Countries TC NCF Revenue Growth 2021-2026 (\$ millions)
- Figure 83. Manufacturing Cost Structure Analysis of TC NCF in 2026
- Figure 84. Manufacturing Process Analysis of TC NCF
- Figure 85. Industry Chain Structure of TC NCF
- Figure 86. Channels of Distribution
- Figure 87. Global TC NCF Sales Market Forecast by Region (2027-2032)
- Figure 88. Global TC NCF Revenue Market Share Forecast by Region (2027-2032)
- Figure 89. Global TC NCF Sales Market Share Forecast by Package Generation Positioning (2027-2032)
- Figure 90. Global TC NCF Revenue Market Share Forecast by Package Generation Positioning (2027-2032)
- Figure 91. Global TC NCF Sales Market Share Forecast by Application (2027-2032)
- Figure 92. Global TC NCF Revenue Market Share Forecast by Application (2027-2032)

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