

Global Integrated Heat Spreaders Market Research Report 2024(Status and Outlook)

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Abstracts

Report Overview

An Integrated Heat Spreader (IHS) is a component used in the manufacturing of semiconductor devices, particularly in the central processing units (CPUs) and other integrated circuits. The primary purpose of an IHS is to facilitate the efficient transfer of heat away from the semiconductor chip, providing thermal management and contributing to overall system reliability.

As the integrated heat spreader industry is developing, technological progress, product popularization and the social influence of the industry will provide a major boost to the industry. The integrated heat spreader industry will gradually mature, and the industry's value-added rate will lead the industry's development direction. The continuous advancement of high-tech technologies, equipment, materials, etc., the popularization of efficient power supply focusing on heat dissipation and intelligent production tools will determine the future development direction of the integrated heat spreader industry. With the continuous popularization of products and applications such as the Internet of Things, chip platforms, and deep learning, as well as the increasing investment in automobiles and home appliances year by year, it will further promote the development of the global integrated radiator industry and help further expand the integrated heat spreader market.

The global Integrated Heat Spreaders market size is projected to reach US\$ 1679.08 Million by 2030 from US\$ 978.45 million in 2023 at a CAGR of 8.50% during 2024-2030. The development of the global integrated heat spreaders industry is driven by several key factors. Firstly, technological advancements in the semiconductor industry, such as increased chip integration and the application of new materials, necessitate more

efficient heat dissipation solutions. Secondly, growing demand from consumer electronics and automotive electronics sectors, fueled by the proliferation of high-performance chips, boosts the market for integrated heat sinks. Additionally, emerging applications like artificial intelligence, cloud computing, and IoT further drive demand for high-performance chips and integrated heat spreaders. Moreover, the gaming and virtual reality industries contribute to the need for efficient cooling capabilities. Lastly, increasing environmental awareness prompts a focus on energy efficiency, presenting both challenges and opportunities for the industry to innovate and meet environmental standards.

In addition, the integrated heat sink market faces considerable challenges. Innovation pressure, fierce competition, artificial intelligence development and related product performance optimization have not met expectations, and environmental regulations and other factors may become risks that hinder market development.

Segment by Type, the Integrated Heat Spreaders can be split into Metal Heat Spreaders, Ceramic Heat Spreaders, etc. In 2023, Metal Heat Spreaders dominated the market with the highest market share of 44.72%. Metal heat sinks are usually made of materials such as copper or aluminum and have excellent thermal conductivity. This property allows them to effectively conduct and transfer heat from electronic components, preventing overheating and ensuring optimal operating temperatures. The high thermal conductivity of metal heat sinks makes them particularly effective at dissipating the heat generated by modern high-performance electronic equipment. Additionally, the robustness of the metal material ensures that the heat sink can withstand continuous thermal cycling without affecting its effectiveness. This durability factor is especially important in applications where electronic components operate under harsh conditions, contributing to the widespread adoption of metal heat sinks. Meanwhile, metal heat sinks often provide cost-effective solutions for thermal management of electronic devices. Availability of raw materials such as copper and aluminum at reasonable costs can help make metal heat sinks more cost-effective. The manufacturing process for metal radiators is sophisticated and efficient, allowing for scalable production to meet demand. The combination of cost effectiveness and manufacturing efficiency enhances the market appeal of metal radiators.

According to application classification, the Integrated Heat Spreaders can be split into Computer, Mobile Phone, Server, Other Consumer Electronics and Other. Currently, the Computer department and Server department occupy the top two positions with market shares of 24.36% and 23.83% respectively. During the forecast period, the Server department will expand at a CAGR of 8.98% and become the department contributing

the highest revenue. The growing reliance on cloud computing, big data analytics and digital services has led to a surge in demand for data centers. Servers in these data centers are constantly running, handling heavy computing workloads, resulting in higher heat generation. Integrated heat sinks play a key role in managing server-related thermal challenges, ensuring optimal performance and preventing overheating. As the demand for data centers around the world continues to grow, the important role that heat sinks play in maintaining the efficiency of server infrastructure is driving the expansion of the server segment.

On basis of geography, the Integrated Heat Spreaders market is segmented into North America, Europe, Asia-Pacific, South America, Middle East and Africa, etc. The Asia-Pacific region has always contributed the highest revenue to the market. During the forecast period, the market size of the Asia-Pacific region will still expand at the highest CAGR, reaching 11.09%. The Asia-Pacific region has become a global center for electronics manufacturing. The region is home to several major electronics manufacturers and original equipment manufacturers (OEMs) involved in the production of consumer electronics, computing equipment, and industrial equipment. The widespread adoption of integrated heat sinks in these electronic products has contributed significantly to the revenue of the Asia Pacific market. Manufacturing activity is concentrated in countries such as China, Japan, South Korea and Taiwan, placing the region at the forefront of the global electronics supply chain. With the continuous development of economic digitization and the rise of cloud computing services, data center infrastructure in the Asia-Pacific region is growing significantly. At the same time, the consumption of consumer electronics products in the Asia-Pacific region has increased significantly. The rising middle class population, rising disposable income, and tech-savvy population are driving strong demand for smartphones, laptops, gaming consoles, and other consumer electronic devices. Integrated heat sinks play a vital role in ensuring the thermal efficiency of these devices.

According to our calculations, the two indicators used to measure the Integrated Heat Spreader market concentration, CR5 and HHI, had reached 65.36% and 10.02% respectively in 2022. This means that the market concentration is low, and players within the market are still in fierce competition. Currently, the major players in the market include Jentech Precision Company Industrial Co. Ltd, Honeywell, SHINKO ELECTRIC INDUSTRIES CO., LTD, Fujikura Ltd., Guangdong Fuxin Technology Co., Ltd, Forcecon Tech. Co., Ltd, Malico Inc., Taisol, Jones Tech, Favor Precision Technology Co., A.L.M.T. Corp., Boyd Corporation, Excel Cell Electronic Co., Ltd, Bitpower International Co., Ltd., T-Global Technology Co.,Ltd, Taiwan Carbon Materials Corp, and Applied Diamond Inc, etc.

This report provides a deep insight into the global Integrated Heat Spreaders market covering all its essential aspects. This ranges from a macro overview of the market to micro details of the market size, competitive landscape, development trend, niche market, key market drivers and challenges, SWOT analysis, value chain analysis, etc.

The analysis helps the reader to shape the competition within the industries and strategies for the competitive environment to enhance the potential profit. Furthermore, it provides a simple framework for evaluating and accessing the position of the business organization. The report structure also focuses on the competitive landscape of the Global Integrated Heat Spreaders Market, this report introduces in detail the market share, market performance, product situation, operation situation, etc. of the main players, which helps the readers in the industry to identify the main competitors and deeply understand the competition pattern of the market.

In a word, this report is a must-read for industry players, investors, researchers, consultants, business strategists, and all those who have any kind of stake or are planning to foray into the Integrated Heat Spreaders market in any manner.

Global Integrated Heat Spreaders Market: Market Segmentation Analysis

The research report includes specific segments by region (country), manufacturers, Type, and Application. Market segmentation creates subsets of a market based on product type, end-user or application, Geographic, and other factors. By understanding the market segments, the decision-maker can leverage this targeting in the product, sales, and marketing strategies. Market segments can power your product development cycles by informing how you create product offerings for different segments.

Key Company

Jentech Precision Company

Honeywell

SHINKO ELECTRIC

Fujikura Ltd.

Guangdong Fuxin

Forcecon Tech. Co., Ltd

Malico Inc.

Taisol

Jones Tech

Favor Precision Technology Co.

A.L.M.T. Corp.

Boyd Corporation

Excel Cell Electronic Co., Ltd

Bitspower International Co., Ltd.

T-Global Technology Co.,Ltd

Taiwan Carbon Materials Corp

Applied Diamond Inc

Others

Market Segmentation (by Type)

Metal Heat Spreaders

Ceramic Heat Spreaders

Graphite Heat Spreader

Others

Market Segmentation (by Application)

Computer

Mobile Phone

Server

Other Consumer Electronics

Other

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Integrated Heat Spreaders Market

Overview of the regional outlook of the Integrated Heat Spreaders Market:

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value (USD Billion) data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Integrated Heat Spreaders Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 10 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 11 provides a quantitative analysis of the market size and development potential of each market segment (product type and application) in the next five years.

Chapter 12 is the main points and conclusions of the report.

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