

Global AI Server Thermal Interface Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global AI Server Thermal Interface Materials market size is expected to reach \$ 1551 million by 2032, rising at a market growth of 17.8% CAGR during the forecast period (2026-2032).

AI server thermal interface materials are functional materials placed between GPUs, AI accelerators, CPUs, HBM, power modules, or high-speed optical modules and heat spreaders, heat sinks, or cold plates. They fill microscopic gaps, reduce contact thermal resistance, and improve heat transfer. Major products include thermal greases, phase change materials, gap pads, dispensable thermal gels, thermally conductive tapes and adhesives, and metallic TIMs. Key requirements include low thermal resistance, pump-out resistance, compressibility, electrical insulation or controlled conductivity, low volatility, and long-term thermal cycling reliability. The blended gross margin is approximately 48%.

Rising AI compute density is increasing accelerator power, HBM stack counts, and board-level power delivery loads, while server thermal architectures are shifting from air cooling toward direct-to-chip cold plates and hybrid liquid cooling. Heat must be transferred rapidly from bare dies, packages, memory, power devices, and optical modules to heat sinks or cold plates, raising both TIM content and value per server.

Product development is moving beyond nominal bulk thermal conductivity toward interface resistance under assembly pressure, long-term pump-out stability, low volatility, and dispensing consistency. Phase change materials, low-modulus high-conductivity gels, silicone-free products, and metallic TIMs are gaining adoption at high heat-flux interfaces, while bond-line control, wettability, and thermal cycling reliability are becoming central qualification criteria.

International material suppliers retain an advantage in high-end TIM 1 and TIM 1.5 products because of formulation know-how, precision coating capabilities, and accumulated reliability data. Suppliers from mainland China and Taiwan are entering server supply chains through gap pads, gels, and die-cut components. Key opportunities include local substitution, co-development with liquid-cooling cold plates, and optical-module thermal upgrades, while major risks include long customer qualification cycles, conductive-filler price volatility, patent constraints, and product substitution caused by changes in packaging and cooling architectures.

Report Scope

This report studies the global AI Server Thermal Interface Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for AI Server Thermal Interface Materials and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of AI Server Thermal Interface Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global AI Server Thermal Interface Materials total production and demand, 2021-2032, (kg)

Global AI Server Thermal Interface Materials total production value, 2021-2032, (USD Million)

Global AI Server Thermal Interface Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global AI Server Thermal Interface Materials consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: AI Server Thermal Interface Materials domestic production, consumption, key domestic manufacturers and share

Global AI Server Thermal Interface Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global AI Server Thermal Interface Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global AI Server Thermal Interface Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global AI Server Thermal Interface Materials market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel, Parker Hannifin, DuPont, 3M, Solstice Advanced Materials, Dow, Shin-Etsu Chemical, Momentive, Wacker Chemie, Fujipoly, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World AI Server Thermal Interface Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global AI Server Thermal Interface Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global AI Server Thermal Interface Materials Market, Segmentation by Type:

- Thermal Greases and Compounds
- Phase Change Materials
- Thermal Gap Pads
- Dispensable Gap Fillers and Thermal Gels
- Thermally Conductive Adhesives and Tapes
- Metallic Thermal Interface Materials

Global AI Server Thermal Interface Materials Market, Segmentation by Thermal Conductivity:

- Up to 3 W/m²K
- Above 3 to 6 W/m²K
- Above 6 to 10 W/m²K
- Above 10 W/m²K

Global AI Server Thermal Interface Materials Market, Segmentation by Matrix Material:

- Silicone-Based Materials
- Acrylic-Based Materials
- Epoxy-Based Materials
- Hydrocarbon and Wax-Based Materials

Carbon-Based Materials

Metal-Based Materials

Other Polymer-Based Materials

Global AI Server Thermal Interface Materials Market, Segmentation by Interface Position:

TIM 1: Die to Heat Spreader

TIM 1.5: Bare Die to Heat Sink or Cold Plate

TIM 2: Package or Heat Spreader to Heat Sink or Cold Plate

Board-Level Components to Chassis or Cold Plate

Optical Modules to Heat Sinks

Other Server Thermal Interfaces

Global AI Server Thermal Interface Materials Market, Segmentation by Application:

AI Accelerators and GPUs

Server CPUs and Custom ASICs

High-Bandwidth Memory and Memory Modules

Power Supply and Voltage Regulation

High-Speed Optical Modules and Network Equipment

Other Server Electronics

Companies Profiled:

Henkel

Parker Hannifin

DuPont

3M

Solstice Advanced Materials

Dow

Shin-Etsu Chemical

Momentive

Wacker Chemie

Fujipoly

Denka

Panasonic Industry

Indium Corporation

Nitto Denko

Saint-Gobain

T-Global Technology

Jones Tech

FRD

GLPOLY

Boyd

Wakefield Thermal

LiPOLY

Sekisui Chemical

Key Questions Answered:

1. How big is the global AI Server Thermal Interface Materials market?
2. What is the demand of the global AI Server Thermal Interface Materials market?
3. What is the year over year growth of the global AI Server Thermal Interface Materials market?
4. What is the production and production value of the global AI Server Thermal Interface Materials market?
5. Who are the key producers in the global AI Server Thermal Interface Materials market?
6. What are the growth factors driving the market demand?

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