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Global Automotive-Grade Thermally Conductive Structural Adhesive Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive-Grade Thermally Conductive Structural Adhesive market size was valued at US$ 372 million in 2025 and is forecast to a readjusted size of US$ 1195 million by 2032 with a CAGR of 18.5% during review period.

Automotive-grade thermally conductive structural adhesives are high-performance adhesives designed specifically for automotive applications—particularly within the power battery and "Three-Electric" systems (battery, motor, and electronic control) of new energy vehicles. These adhesives serve dual functions: structural bonding/load-bearing fixation and heat conduction. They offer high lap-shear strength, thermal conductivity of approximately 1–5 W/m·K, electrical insulation, flame retardancy, and resistance to thermal cycling and vibration. They also provide reliable adhesion to substrates such as aluminum, battery cell blue film, steel, and composite materials. Capable of partially replacing mechanical fasteners like bolts and rivets, they conduct heat generated by battery cells or electronic components to cooling plates or housings. Applications include bonding cells to modules, cells to packs, and cells/modules to liquid cooling plates, as well as structural bonding for CTP (Cell-to-Pack) and CTC (Cell-to-Chassis) architectures. Usage extends to inverters, OBCs, DC/DC converters, electric drive controllers, power modules, and other high-power automotive electronics. Future developments—such as 800V high-voltage platforms, ultra-fast charging, high-energy-density batteries, large cylindrical cells, and CTP/CTC structures—will further increase the volume and performance requirements of these adhesives per vehicle. The upstream supply chain primarily consists of base materials (polyurethane, epoxy resin, silicone rubber, acrylic resin, etc.), thermally conductive fillers (alumina, boron nitride, etc.), and functional additives (curing agents, catalysts, coupling agents, flame

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retardants, toughening agents, etc.). Midstream enterprises handle formulation R&D, filler surface modification, rheology control, rapid curing, and automotive-grade reliability validation, while the downstream sector comprises automotive OEMs. Geographically, the Asia-Pacific region is the largest market for both production and consumption, with demand for automotive-grade thermally conductive structural adhesives heavily concentrated in the battery supply chains of China and South Korea. Future industry development will focus on the simultaneous achievement of higher thermal conductivity and lower density, the integration of thermal management with structural load-bearing functions, rapid room-temperature curing, low-wear filler systems, enhanced flame retardancy and electrical insulation, and designs that facilitate disassembly and repair. Notably, CTP and CTC technologies are blurring the functional boundaries between standard thermal interface materials (TIMs) and structural adhesives, while the demands of high-voltage fast charging and battery thermal safety are driving the growth of products with thermal conductivity of 3 W/m·K or higher. Simultaneously, pressure on OEMs to reduce costs is accelerating domestic substitution by Chinese suppliers and the expansion of global supply chains; consequently, the core of industry competition is shifting from a singular focus on thermal conductivity to a comprehensive contest involving thermal conductivity, shear strength, elongation, density, dispensing speed, long-term durability, and the capability for joint development with vehicle platforms.

Report Scope

This report is a detailed and comprehensive analysis for global Automotive-Grade Thermally Conductive Structural Adhesive market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive-Grade Thermally Conductive Structural Adhesive market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

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Global Automotive-Grade Thermally Conductive Structural Adhesive market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Automotive-Grade Thermally Conductive Structural Adhesive market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Automotive-Grade Thermally Conductive Structural Adhesive market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive-Grade Thermally Conductive Structural Adhesive

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive-Grade Thermally Conductive Structural Adhesive market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel, DuPont, Sika, Parker Hannifin, Bostik, WEVO-CHEMIE, H.B. Fuller, ELANTAS, Dow, Wacker Chemie, etc.

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

Automotive-Grade Thermally Conductive Structural Adhesive market is split by Type and by Application. For the period 2021-2032, the growth among segments provides

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accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Polyurethane

Epoxy

Acrylic

Silicone

Others

Market segment by Thermal Conductivity

Low (<1.5 W/m·K)

Medium (1.5–3 W/m·K)

High (>3 W/m·K)

Market segment by Component Form

One-component

Two-component

Market segment by Application

Passenger Car

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Commercial Vehicle

Major players covered

Henkel

DuPont

Sika

Parker Hannifin

Bostik

WEVO-CHEMIE

H.B. Fuller

ELANTAS

Dow

Wacker Chemie

LG Chem

Pustar

CollTech Technology

Trumonytechs

Permabond

Master Bond

Hubei Huitian New Materials

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Darbond Technology

Shenzhen Goldlink Tongda Electronics

Youxing Shark (Shanghai) Science and Technology

SEPNA Chemical

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Automotive-Grade Thermally Conductive Structural Adhesive product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive-Grade Thermally Conductive Structural Adhesive, with price, sales quantity, revenue, and global market share of Automotive-Grade Thermally Conductive Structural Adhesive from 2021 to 2026.

Chapter 3, the Automotive-Grade Thermally Conductive Structural Adhesive competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive-Grade Thermally Conductive Structural Adhesive breakdown

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data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Automotive-Grade Thermally Conductive Structural Adhesive market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Automotive-Grade Thermally Conductive Structural Adhesive.

Chapter 14 and 15, to describe Automotive-Grade Thermally Conductive Structural Adhesive sales channel, distributors, customers, research findings and conclusion.

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