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Global Automotive-Grade Thermally Conductive Structural Adhesive Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive-Grade Thermally Conductive Structural Adhesive market size is expected to reach $ 1195 million by 2032, rising at a market growth of 18.5% CAGR during the forecast period (2026-2032).

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 retardants, toughening agents, etc.). Midstream enterprises handle formulation R&D,

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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 studies the global Automotive-Grade Thermally Conductive Structural Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive-Grade Thermally Conductive Structural Adhesive 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 Automotive-Grade Thermally Conductive Structural Adhesive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive-Grade Thermally Conductive Structural Adhesive total production and demand, 2021-2032, (Tons)

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Global Automotive-Grade Thermally Conductive Structural Adhesive total production value, 2021-2032, (USD Million)

Global Automotive-Grade Thermally Conductive Structural Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Automotive-Grade Thermally Conductive Structural Adhesive consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Automotive-Grade Thermally Conductive Structural Adhesive domestic production, consumption, key domestic manufacturers and share

Global Automotive-Grade Thermally Conductive Structural Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Automotive-Grade Thermally Conductive Structural Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Automotive-Grade Thermally Conductive Structural Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Automotive-Grade Thermally Conductive Structural Adhesive 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive-Grade Thermally Conductive Structural Adhesive market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) 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 Automotive-Grade Thermally Conductive Structural Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Automotive-Grade Thermally Conductive Structural Adhesive Market, Segmentation by Type:

Polyurethane

Epoxy

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Acrylic

Silicone

Others

Global Automotive-Grade Thermally Conductive Structural Adhesive Market, Segmentation by Thermal Conductivity:

Low (<1.5 W/m·K)

Medium (1.5–3 W/m·K)

High (>3 W/m·K)

Global Automotive-Grade Thermally Conductive Structural Adhesive Market, Segmentation by Component Form:

One-component

Two-component

Global Automotive-Grade Thermally Conductive Structural Adhesive Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

Henkel

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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

Darbond Technology

Shenzhen Goldlink Tongda Electronics

Youxing Shark (Shanghai) Science and Technology

SEPNA Chemical

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Key Questions Answered

1. How big is the global Automotive-Grade Thermally Conductive Structural Adhesive market?
2. What is the demand of the global Automotive-Grade Thermally Conductive Structural Adhesive market?
3. What is the year over year growth of the global Automotive-Grade Thermally Conductive Structural Adhesive market?
4. What is the total value of the global Automotive-Grade Thermally Conductive Structural Adhesive market?
5. Who are the Major Players in the global Automotive-Grade Thermally Conductive Structural Adhesive market?
6. What are the growth factors driving the market demand?

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