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Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G518D2D23BA8EN.html
Date: June 2026
Pages: 124
Price: US$ 4,480.00 (Single User License)
ID: G518D2D23BA8EN

Abstracts

The global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market size is expected to reach $ 233 million by 2032, rising at a market growth of 12.6% CAGR during the forecast period (2026-2032).

In 2025, global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets sales reached approximately 103 K Sqm with an average global market price of around 945 USD per Sqm.

Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets are sheet-form thermal management materials that use hexagonal boron nitride, platelet boron nitride, modified boron nitride, or boron-nitride-based composite fillers as the main thermally conductive phase, combined with silicone rubber, epoxy resin, polyimide, polyurethane, acrylic resin, or other polymer matrices. Their core feature is the ability to provide efficient in-plane or through-plane heat transfer while maintaining electrical insulation, dielectric strength, and dielectric stability. They are used to fill microscopic gaps between electronic components, power modules, battery assemblies, heat sinks, housings, and structural parts, thereby reducing interface thermal resistance and improving system-level thermal reliability. Compared with graphite sheets and metallic thermal sheets, boron nitride-based sheets offer stronger electrical insulation, heat resistance, chemical stability, and low dielectric loss. Compared with conventional alumina- or aluminum-hydroxide-filled thermal pads, they offer higher value in high-thermal-conductivity, lightweight, and high-frequency electronic applications. Major applications include EV power electronics, power semiconductors, communication base stations, AI servers, battery packs, LEDs, consumer electronics, industrial power supplies, and high-end electrically insulating thermal structures.

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The gross margin of Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets can generally be estimated at 30%–60%. Standard silicone- or resin-based boron nitride thermal sheets, regular insulating pads, and mid-to-low thermal conductivity grades are usually in the 30%–45% range. High-filler-loading, highly oriented, high-dielectric-strength, low-dielectric-loss, low-volatility, low-bleeding, low-compression-set, automotive-grade, or semiconductor-grade products can reach 45%–60%, due to higher requirements for formulation design, filler dispersion, interface modification, calendaring, sheet forming, and reliability validation. The upstream value chain includes boron sources, nitrogen sources, hexagonal boron nitride powder, modified boron nitride, silicone rubber, epoxy, polyimide, coupling agents, flame retardants, release films, and precision coating or calendaring equipment. The midstream covers particle-size control, surface modification, filler orientation, compounding and dispersion, sheet forming, thickness control, die cutting, adhesive backing, dielectric strength testing, and thermal conductivity testing. Downstream applications include power semiconductors, electric vehicles, energy storage, AI servers, communication equipment, LED displays and lighting, consumer electronics, and industrial control systems. Profitability mainly depends on boron nitride powder grade, filler loading level, thermal conductivity, dielectric strength, customer qualification cycle, batch consistency, and access to high-reliability electronics supply chains.

Market Development Opportunities & Main Driving Factors

The growth of Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets is driven by the simultaneous need for heat dissipation and electrical insulation in high-power-density electronic systems. Electric vehicles, electric drive systems, charging modules, energy storage inverters, power semiconductors, communication equipment, and AI servers are all increasing power density, requiring materials that can conduct heat, isolate current, reduce breakdown risk, and withstand long-term thermal cycling. Public energy and industrial policies continue to emphasize electrification, energy efficiency, and data-center energy optimization, pushing high-reliability thermal materials from auxiliary components toward key elements of system safety and performance design. The IEA’s continued tracking of electric vehicles and battery supply chains shows that electrification remains an important foundation for power electronics and thermal management demand, while the U.S. Department of Energy has identified data-center electricity demand growth and AI workload changes as key energy-system issues. Against this backdrop, boron nitride-based sheets with high thermal conductivity, electrical insulation, low dielectric loss, and processability are well positioned to penetrate high-end electronics, new energy, and high-frequency

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communication applications.

Market Challenges, Risks, & Restraints

The main challenge in this industry lies in the trade-off between material properties. Higher boron nitride loading improves thermal conductivity, but may reduce sheet flexibility, weaken interface adhesion, increase processing difficulty, and raise material cost. When high dielectric strength is required, manufacturers must also control porosity, impurities, thickness uniformity, and long-term aging stability. High-end customers typically require materials to meet thermal conductivity, dielectric strength, flame retardancy, compression recovery, weather resistance, low volatility, low ionic contamination, and long-term reliability requirements at the same time, leading to long qualification cycles. In addition, alumina, aluminum nitride, graphite, silicone thermal pads, phase-change materials, and metal-based TIMs remain competitive alternatives in different use cases. If end customers prioritize cost over electrically insulating high-thermal performance, the penetration of boron nitride-based sheets may be constrained. Future competition will shift from simple thermal conductivity comparison to integrated capability in powder modification, composite structure design, thickness precision, reliability validation, and customer co-development.

Downstream Demand Trends

Downstream demand will evolve toward higher dielectric strength, higher thermal conductivity, thinner profiles, lower dielectric loss, and stronger customization. Electric vehicle and energy storage customers will place greater emphasis on electrical isolation and thermal safety in battery packs, BMS, power control units, onboard chargers, DC-DC converters, inverters, and power modules. AI server and communication equipment customers will focus more on heat spreading and insulation protection in high-density boards, power modules, RF devices, and high-speed computing units. LED displays, Mini/Micro LED, and consumer electronics will require thinner, lighter, easier-to-die-cut insulating thermal sheets that are more compatible with automated assembly. As data-center energy demand, vehicle electrification, and high-frequency high-speed electronics continue to develop, customer purchasing logic will shift from single-material unit price to a comprehensive assessment of thermal conductivity, insulation, reliability, assembly efficiency, and system safety. Suppliers with high-quality boron nitride powder control, orientation-based composite processing, stable mass-production capability, and end-customer qualification experience will be better positioned to enter high-end application chains.

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This report studies the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets 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 Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets total production and demand, 2021-2032, (K Sqm)
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets total production value, 2021-2032, (USD Million)
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets consumption by region & country, CAGR, 2021-2032 & (K Sqm)
U.S. VS China: Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets domestic production, consumption, key domestic manufacturers and share
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)
Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets 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 Mitsubishi Chemical, Denka, Bando Chemical Industries, Dexerials, Qnity Electronics,, Guangdong Surpons Technology, Dongguan U-Sheen, Ziitek, RISHO KOGYO, Huasee Electronic Technology, etc.

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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 Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Sqm) and average price (US$/Sq m) 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 Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, Segmentation by Type:

Epoxy Composite

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Silicone Composite

Polyimide Composite

PDMS Composite

Others

Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, Segmentation by BN Functional Phase:

h-BN Platelet Filler

Agglomerated BN Filler

2D BN Nanosheets

Oriented BN Filler Network

Others

Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, Segmentation by Thermal Conductivity Grade:

Standard Grade (12 W/mK)

Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, Segmentation by Manufacturing Process:

Tape Casting

Hot-Pressing

Others

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Global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets Market, Segmentation by Application:

EV & Transportation

Telecommunications & ICT

Semiconductors & Microelectronics

Industrial Energy & Power

Aerospace & Defense

Others

Companies Profiled:

Mitsubishi Chemical

Denka

Bando Chemical Industries

Dexerials

Qnity Electronics,

Guangdong Surpons Technology

Dongguan U-Sheen

Ziitek

RISHO KOGYO

Huasee Electronic Technology

Yamamura Photonics

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Key Questions Answered:

1. How big is the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market?
2. What is the demand of the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market?
3. What is the year over year growth of the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market?
4. What is the production and production value of the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market?
5. Who are the key producers in the global Boron Nitride-Based Electrically Insulating Thermally Conductive Sheets market?
6. What are the growth factors driving the market demand?

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