

# Global EV Battery Pack Thermal Conductive Gel Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global EV Battery Pack Thermal Conductive Gel market size is expected to reach \$ 1583 million by 2032, rising at a market growth of 13.9% CAGR during the forecast period (2026-2032).

In 2025, mainstream EV battery pack thermal conductive gel products are typically priced at approximately USD 18–32 per kilogram, while automotive-grade high-performance formulations generally maintain gross margins of 28%–45%. This market primarily focuses on liquid or semi-liquid thermal interface gel materials used inside EV and PHEV battery pack thermal management systems, including battery pack gap filler gels, thermal conductive gels between battery cells and cooling plates, module-level thermal interface gels, two-component dispensable thermal gels, and silicone-based or polyurethane-based battery TIM gel systems. These materials are commonly formulated using silicone, polyurethane, or modified polymer matrices combined with highly thermally conductive ceramic fillers, and are manufactured through low-modulus structural design, vacuum deaeration, two-component mixing, automated dispensing, and curing processes to achieve efficient heat transfer and long-term reliability management. Key performance specifications typically include thermal conductivity, dielectric strength, compressibility, flame retardancy, volatile emission control, thermal cycling durability, and long-term aging stability. With the rapid development of CTP and CTC battery architectures, large cylindrical battery platforms, 800V high-voltage fast-charging systems, and high-energy-density EV battery technologies, thermal density and thermal uniformity requirements inside battery packs are increasing significantly. As a result, thermal conductive gels are evolving from localized thermal interface auxiliary materials into critical full-pack thermal management materials and are now widely used in BEV passenger vehicles, PHEV systems, electric commercial vehicles, and highly integrated battery pack platforms to improve battery safety, thermal stability, cycle life,

and high-power operating performance.

According to our research, Battery Pack Thermal Conductive Gel has become one of the fastest-growing segments within the global thermal interface materials industry, driven primarily by the rapid expansion of electric vehicles and the increasing complexity of battery thermal management systems. As EV battery architectures continue evolving toward higher energy density, larger pack capacity, ultra-fast charging capability, and integrated CTP/CTC structures, conventional thermal pads and solid TIM materials are increasingly unable to meet the requirements for gap-filling flexibility, thermal cycling durability, and automated dispensing compatibility. As a result, liquid and dispensable thermal conductive gels with low modulus, high conformability, and reliable long-term thermal stability are rapidly becoming the preferred solution for battery pack thermal management applications. From the supply-side perspective, the high-end market remains largely dominated by established material companies from Europe, the United States, and Japan, particularly in silicone-based thermal gel systems with strong automotive qualification capabilities and global OEM customer relationships. However, Chinese domestic manufacturers are rapidly gaining market share due to the localization trend of the EV supply chain and the explosive growth of China's battery manufacturing ecosystem. Several Chinese suppliers have already entered the procurement systems of leading battery manufacturers and EV OEMs. Meanwhile, suppliers from South Korea and Taiwan are leveraging their existing silicone material and electronic adhesive capabilities to expand into EV thermal management applications. Industry dynamics indicate continued capacity expansion, regional supply chain relocation, and increasing capital investment into thermal interface material production, especially in China. From the demand structure perspective, EV battery packs remain the dominant application segment, while energy storage systems are emerging as a secondary growth engine. Large-format battery cells, structural battery pack designs, and fast-charging platforms are significantly increasing thermal conductive gel consumption per vehicle. Looking ahead, industry competition is expected to shift away from purely thermal conductivity metrics toward comprehensive performance capabilities, including dispensing efficiency, long-term reliability, flame retardancy, low density, oil bleed resistance, and compatibility with automated manufacturing systems. As battery safety regulations continue tightening globally and thermal runaway mitigation becomes increasingly important, high-performance battery thermal conductive gels are expected to maintain strong long-term growth momentum through the next decade.

This report studies the global EV Battery Pack Thermal Conductive Gel production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for EV Battery Pack Thermal Conductive Gel 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 EV Battery Pack Thermal Conductive Gel that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global EV Battery Pack Thermal Conductive Gel total production and demand, 2021-2032, (kg)

Global EV Battery Pack Thermal Conductive Gel total production value, 2021-2032, (USD Million)

Global EV Battery Pack Thermal Conductive Gel production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global EV Battery Pack Thermal Conductive Gel consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: EV Battery Pack Thermal Conductive Gel domestic production, consumption, key domestic manufacturers and share

Global EV Battery Pack Thermal Conductive Gel production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global EV Battery Pack Thermal Conductive Gel production by Thermal Conductivity, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global EV Battery Pack Thermal Conductive Gel production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global EV Battery Pack Thermal Conductive Gel 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 AG & Co. KGaA, Dow Inc., Shin-Etsu Chemical Co., Ltd., Momentive Performance Materials, Wacker Chemie AG, Parker Hannifin Corporation, Laird Performance Materials, Fujipoly, Rogers Corporation, Shenzhen FRD Science & Technology, 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 EV Battery Pack Thermal Conductive Gel 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 Thermal Conductivity, 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 EV Battery Pack Thermal Conductive Gel Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global EV Battery Pack Thermal Conductive Gel Market, Segmentation by Thermal Conductivity:

Below 2 W

2–4 W

4–6 W

Above 6 W

## Global EV Battery Pack Thermal Conductive Gel Market, Segmentation by Material System:

Silicone-based Gel

Polyurethane-based Gel

Hybrid Polymer Gel

Others

## Global EV Battery Pack Thermal Conductive Gel Market, Segmentation by Viscosity:

Low viscosity (500,000 cP)

Others

## Global EV Battery Pack Thermal Conductive Gel Market, Segmentation by Application:

Battery Cell-to-Cold Plate Thermal Interface

Battery Module Gap Filling

Cell-to-Pack (CTP) Thermal Management

Cell-to-Chassis (CTC) Thermal Management

Others

## Companies Profiled:

Henkel AG & Co. KGaA

Dow Inc.

Shin-Etsu Chemical Co., Ltd.

Momentive Performance Materials

Wacker Chemie AG

Parker Hannifin Corporation

Laird Performance Materials

Fujipoly

Rogers Corporation

Shenzhen FRD Science & Technology

Suzhou Anjie Technology

Dongguan Betterly

LG Chem Ltd.

KCC Corporation

Eternal Materials Co., Ltd.

Huntsman Corporation

Indium Corporation

Master Bond Inc.

#### Key Questions Answered:

1. How big is the global EV Battery Pack Thermal Conductive Gel market?
2. What is the demand of the global EV Battery Pack Thermal Conductive Gel market?
3. What is the year over year growth of the global EV Battery Pack Thermal Conductive Gel market?
4. What is the production and production value of the global EV Battery Pack Thermal Conductive Gel market?

5. Who are the key producers in the global EV Battery Pack Thermal Conductive Gel market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 EV Battery Pack Thermal Conductive Gel Introduction
- 1.2 World EV Battery Pack Thermal Conductive Gel Supply & Forecast
  - 1.2.1 World EV Battery Pack Thermal Conductive Gel Production Value (2021 & 2025 & 2032)
  - 1.2.2 World EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.2.3 World EV Battery Pack Thermal Conductive Gel Pricing Trends (2021-2032)
- 1.3 World EV Battery Pack Thermal Conductive Gel Production by Region (Based on Production Site)
  - 1.3.1 World EV Battery Pack Thermal Conductive Gel Production Value by Region (2021-2032)
  - 1.3.2 World EV Battery Pack Thermal Conductive Gel Production by Region (2021-2032)
  - 1.3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Region (2021-2032)
  - 1.3.4 North America EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.3.5 Europe EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.3.6 China EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.3.7 Japan EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.3.8 India EV Battery Pack Thermal Conductive Gel Production (2021-2032)
  - 1.3.9 Southeast Asia EV Battery Pack Thermal Conductive Gel Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 EV Battery Pack Thermal Conductive Gel Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 EV Battery Pack Thermal Conductive Gel Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World EV Battery Pack Thermal Conductive Gel Demand (2021-2032)
- 2.2 World EV Battery Pack Thermal Conductive Gel Consumption by Region
  - 2.2.1 World EV Battery Pack Thermal Conductive Gel Consumption by Region (2021-2026)
  - 2.2.2 World EV Battery Pack Thermal Conductive Gel Consumption Forecast by Region (2027-2032)
- 2.3 United States EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)

- 2.4 China EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)
- 2.5 Europe EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)
- 2.6 Japan EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)
- 2.7 South Korea EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)
- 2.8 ASEAN EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)
- 2.9 India EV Battery Pack Thermal Conductive Gel Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World EV Battery Pack Thermal Conductive Gel Production Value by Manufacturer (2021-2026)

3.2 World EV Battery Pack Thermal Conductive Gel Production by Manufacturer (2021-2026)

3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Manufacturer (2021-2026)

3.4 EV Battery Pack Thermal Conductive Gel Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global EV Battery Pack Thermal Conductive Gel Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for EV Battery Pack Thermal Conductive Gel in 2025

3.5.3 Global Concentration Ratios (CR8) for EV Battery Pack Thermal Conductive Gel in 2025

3.6 EV Battery Pack Thermal Conductive Gel Market: Overall Company Footprint Analysis

3.6.1 EV Battery Pack Thermal Conductive Gel Market: Region Footprint

3.6.2 EV Battery Pack Thermal Conductive Gel Market: Company Product Type Footprint

3.6.3 EV Battery Pack Thermal Conductive Gel Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

### **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

#### 4.1 United States VS China: EV Battery Pack Thermal Conductive Gel Production Value Comparison

4.1.1 United States VS China: EV Battery Pack Thermal Conductive Gel Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: EV Battery Pack Thermal Conductive Gel Production Value Market Share Comparison (2021 & 2025 & 2032)

#### 4.2 United States VS China: EV Battery Pack Thermal Conductive Gel Production Comparison

4.2.1 United States VS China: EV Battery Pack Thermal Conductive Gel Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: EV Battery Pack Thermal Conductive Gel Production Market Share Comparison (2021 & 2025 & 2032)

#### 4.3 United States VS China: EV Battery Pack Thermal Conductive Gel Consumption Comparison

4.3.1 United States VS China: EV Battery Pack Thermal Conductive Gel Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: EV Battery Pack Thermal Conductive Gel Consumption Market Share Comparison (2021 & 2025 & 2032)

#### 4.4 United States Based EV Battery Pack Thermal Conductive Gel Manufacturers and Market Share, 2021-2026

4.4.1 United States Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value (2021-2026)

4.4.3 United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production (2021-2026)

#### 4.5 China Based EV Battery Pack Thermal Conductive Gel Manufacturers and Market Share

4.5.1 China Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value (2021-2026)

4.5.3 China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production (2021-2026)

#### 4.6 Rest of World Based EV Battery Pack Thermal Conductive Gel Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel

Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production (2021-2026)

## **5 MARKET ANALYSIS BY THERMAL CONDUCTIVITY**

5.1 World EV Battery Pack Thermal Conductive Gel Market Size Overview by Thermal Conductivity: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Thermal Conductivity

5.2.1 Below 2 W

5.2.2 2–4 W

5.2.3 4–6 W

5.2.4 Above 6 W

5.3 Market Segment by Thermal Conductivity

5.3.1 World EV Battery Pack Thermal Conductive Gel Production by Thermal Conductivity (2021-2032)

5.3.2 World EV Battery Pack Thermal Conductive Gel Production Value by Thermal Conductivity (2021-2032)

5.3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Thermal Conductivity (2021-2032)

## **6 MARKET ANALYSIS BY MATERIAL SYSTEM**

6.1 World EV Battery Pack Thermal Conductive Gel Market Size Overview by Material System: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Material System

6.2.1 Silicone-based Gel

6.2.2 Polyurethane-based Gel

6.2.3 Hybrid Polymer Gel

6.2.4 Others

6.3 Market Segment by Material System

6.3.1 World EV Battery Pack Thermal Conductive Gel Production by Material System (2021-2032)

6.3.2 World EV Battery Pack Thermal Conductive Gel Production Value by Material System (2021-2032)

6.3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Material System (2021-2032)

## **7 MARKET ANALYSIS BY VISCOSITY**

7.1 World EV Battery Pack Thermal Conductive Gel Market Size Overview by Viscosity: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Viscosity

7.2.1 Low viscosity (500,000 cP)

7.2.4 Others

7.3 Market Segment by Viscosity

7.3.1 World EV Battery Pack Thermal Conductive Gel Production by Viscosity (2021-2032)

7.3.2 World EV Battery Pack Thermal Conductive Gel Production Value by Viscosity (2021-2032)

7.3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Viscosity (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World EV Battery Pack Thermal Conductive Gel Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Battery Cell-to-Cold Plate Thermal Interface

8.2.2 Battery Module Gap Filling

8.2.3 Cell-to-Pack (CTP) Thermal Management

8.2.4 Cell-to-Chassis (CTC) Thermal Management

8.2.5 Others

8.3 Market Segment by Application

8.3.1 World EV Battery Pack Thermal Conductive Gel Production by Application (2021-2032)

8.3.2 World EV Battery Pack Thermal Conductive Gel Production Value by Application (2021-2032)

8.3.3 World EV Battery Pack Thermal Conductive Gel Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Henkel AG & Co. KGaA

9.1.1 Henkel AG & Co. KGaA Details

9.1.2 Henkel AG & Co. KGaA Major Business

9.1.3 Henkel AG & Co. KGaA EV Battery Pack Thermal Conductive Gel Product and Services

9.1.4 Henkel AG & Co. KGaA EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Henkel AG & Co. KGaA Recent Developments/Updates

9.1.6 Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

9.2 Dow Inc.

9.2.1 Dow Inc. Details

9.2.2 Dow Inc. Major Business

9.2.3 Dow Inc. EV Battery Pack Thermal Conductive Gel Product and Services

9.2.4 Dow Inc. EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Dow Inc. Recent Developments/Updates

9.2.6 Dow Inc. Competitive Strengths & Weaknesses

9.3 Shin-Etsu Chemical Co., Ltd.

9.3.1 Shin-Etsu Chemical Co., Ltd. Details

9.3.2 Shin-Etsu Chemical Co., Ltd. Major Business

9.3.3 Shin-Etsu Chemical Co., Ltd. EV Battery Pack Thermal Conductive Gel Product and Services

9.3.4 Shin-Etsu Chemical Co., Ltd. EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

9.3.6 Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

9.4 Momentive Performance Materials

9.4.1 Momentive Performance Materials Details

9.4.2 Momentive Performance Materials Major Business

9.4.3 Momentive Performance Materials EV Battery Pack Thermal Conductive Gel Product and Services

9.4.4 Momentive Performance Materials EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Momentive Performance Materials Recent Developments/Updates

9.4.6 Momentive Performance Materials Competitive Strengths & Weaknesses

9.5 Wacker Chemie AG

9.5.1 Wacker Chemie AG Details

9.5.2 Wacker Chemie AG Major Business

9.5.3 Wacker Chemie AG EV Battery Pack Thermal Conductive Gel Product and Services

9.5.4 Wacker Chemie AG EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Wacker Chemie AG Recent Developments/Updates

9.5.6 Wacker Chemie AG Competitive Strengths & Weaknesses

## 9.6 Parker Hannifin Corporation

9.6.1 Parker Hannifin Corporation Details

9.6.2 Parker Hannifin Corporation Major Business

9.6.3 Parker Hannifin Corporation EV Battery Pack Thermal Conductive Gel Product and Services

9.6.4 Parker Hannifin Corporation EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Parker Hannifin Corporation Recent Developments/Updates

9.6.6 Parker Hannifin Corporation Competitive Strengths & Weaknesses

## 9.7 Laird Performance Materials

9.7.1 Laird Performance Materials Details

9.7.2 Laird Performance Materials Major Business

9.7.3 Laird Performance Materials EV Battery Pack Thermal Conductive Gel Product and Services

9.7.4 Laird Performance Materials EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Laird Performance Materials Recent Developments/Updates

9.7.6 Laird Performance Materials Competitive Strengths & Weaknesses

## 9.8 Fujipoly

9.8.1 Fujipoly Details

9.8.2 Fujipoly Major Business

9.8.3 Fujipoly EV Battery Pack Thermal Conductive Gel Product and Services

9.8.4 Fujipoly EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Fujipoly Recent Developments/Updates

9.8.6 Fujipoly Competitive Strengths & Weaknesses

## 9.9 Rogers Corporation

9.9.1 Rogers Corporation Details

9.9.2 Rogers Corporation Major Business

9.9.3 Rogers Corporation EV Battery Pack Thermal Conductive Gel Product and Services

9.9.4 Rogers Corporation EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Rogers Corporation Recent Developments/Updates

9.9.6 Rogers Corporation Competitive Strengths & Weaknesses

## 9.10 Shenzhen FRD Science & Technology

9.10.1 Shenzhen FRD Science & Technology Details

9.10.2 Shenzhen FRD Science & Technology Major Business

9.10.3 Shenzhen FRD Science & Technology EV Battery Pack Thermal Conductive

## Gel Product and Services

9.10.4 Shenzhen FRD Science & Technology EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Shenzhen FRD Science & Technology Recent Developments/Updates

9.10.6 Shenzhen FRD Science & Technology Competitive Strengths & Weaknesses

## 9.11 Suzhou Anjie Technology

9.11.1 Suzhou Anjie Technology Details

9.11.2 Suzhou Anjie Technology Major Business

9.11.3 Suzhou Anjie Technology EV Battery Pack Thermal Conductive Gel Product and Services

9.11.4 Suzhou Anjie Technology EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Suzhou Anjie Technology Recent Developments/Updates

9.11.6 Suzhou Anjie Technology Competitive Strengths & Weaknesses

## 9.12 Dongguan Betterly

9.12.1 Dongguan Betterly Details

9.12.2 Dongguan Betterly Major Business

9.12.3 Dongguan Betterly EV Battery Pack Thermal Conductive Gel Product and Services

9.12.4 Dongguan Betterly EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Dongguan Betterly Recent Developments/Updates

9.12.6 Dongguan Betterly Competitive Strengths & Weaknesses

## 9.13 LG Chem Ltd.

9.13.1 LG Chem Ltd. Details

9.13.2 LG Chem Ltd. Major Business

9.13.3 LG Chem Ltd. EV Battery Pack Thermal Conductive Gel Product and Services

9.13.4 LG Chem Ltd. EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 LG Chem Ltd. Recent Developments/Updates

9.13.6 LG Chem Ltd. Competitive Strengths & Weaknesses

## 9.14 KCC Corporation

9.14.1 KCC Corporation Details

9.14.2 KCC Corporation Major Business

9.14.3 KCC Corporation EV Battery Pack Thermal Conductive Gel Product and Services

9.14.4 KCC Corporation EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 KCC Corporation Recent Developments/Updates

- 9.14.6 KCC Corporation Competitive Strengths & Weaknesses
- 9.15 Eternal Materials Co., Ltd.
  - 9.15.1 Eternal Materials Co., Ltd. Details
  - 9.15.2 Eternal Materials Co., Ltd. Major Business
  - 9.15.3 Eternal Materials Co., Ltd. EV Battery Pack Thermal Conductive Gel Product and Services
  - 9.15.4 Eternal Materials Co., Ltd. EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.15.5 Eternal Materials Co., Ltd. Recent Developments/Updates
  - 9.15.6 Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
- 9.16 Huntsman Corporation
  - 9.16.1 Huntsman Corporation Details
  - 9.16.2 Huntsman Corporation Major Business
  - 9.16.3 Huntsman Corporation EV Battery Pack Thermal Conductive Gel Product and Services
  - 9.16.4 Huntsman Corporation EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.16.5 Huntsman Corporation Recent Developments/Updates
  - 9.16.6 Huntsman Corporation Competitive Strengths & Weaknesses
- 9.17 Indium Corporation
  - 9.17.1 Indium Corporation Details
  - 9.17.2 Indium Corporation Major Business
  - 9.17.3 Indium Corporation EV Battery Pack Thermal Conductive Gel Product and Services
  - 9.17.4 Indium Corporation EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.17.5 Indium Corporation Recent Developments/Updates
  - 9.17.6 Indium Corporation Competitive Strengths & Weaknesses
- 9.18 Master Bond Inc.
  - 9.18.1 Master Bond Inc. Details
  - 9.18.2 Master Bond Inc. Major Business
  - 9.18.3 Master Bond Inc. EV Battery Pack Thermal Conductive Gel Product and Services
  - 9.18.4 Master Bond Inc. EV Battery Pack Thermal Conductive Gel Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.18.5 Master Bond Inc. Recent Developments/Updates
  - 9.18.6 Master Bond Inc. Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

- 10.1 EV Battery Pack Thermal Conductive Gel Industry Chain
- 10.2 EV Battery Pack Thermal Conductive Gel Upstream Analysis
  - 10.2.1 EV Battery Pack Thermal Conductive Gel Core Raw Materials
  - 10.2.2 Main Manufacturers of EV Battery Pack Thermal Conductive Gel Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 EV Battery Pack Thermal Conductive Gel Production Mode
- 10.6 EV Battery Pack Thermal Conductive Gel Procurement Model
- 10.7 EV Battery Pack Thermal Conductive Gel Industry Sales Model and Sales Channels
  - 10.7.1 EV Battery Pack Thermal Conductive Gel Sales Model
  - 10.7.2 EV Battery Pack Thermal Conductive Gel Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World EV Battery Pack Thermal Conductive Gel Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World EV Battery Pack Thermal Conductive Gel Production Value by Region (2021-2026) & (USD Million)

Table 3. World EV Battery Pack Thermal Conductive Gel Production Value by Region (2027-2032) & (USD Million)

Table 4. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Region (2021-2026)

Table 5. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Region (2027-2032)

Table 6. World EV Battery Pack Thermal Conductive Gel Production by Region (2021-2026) & (kg)

Table 7. World EV Battery Pack Thermal Conductive Gel Production by Region (2027-2032) & (kg)

Table 8. World EV Battery Pack Thermal Conductive Gel Production Market Share by Region (2021-2026)

Table 9. World EV Battery Pack Thermal Conductive Gel Production Market Share by Region (2027-2032)

Table 10. World EV Battery Pack Thermal Conductive Gel Average Price by Region (2021-2026) & (US\$/kg)

Table 11. World EV Battery Pack Thermal Conductive Gel Average Price by Region (2027-2032) & (US\$/kg)

Table 12. EV Battery Pack Thermal Conductive Gel Major Market Trends

Table 13. World EV Battery Pack Thermal Conductive Gel Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (kg)

Table 14. World EV Battery Pack Thermal Conductive Gel Consumption by Region (2021-2026) & (kg)

Table 15. World EV Battery Pack Thermal Conductive Gel Consumption Forecast by Region (2027-2032) & (kg)

Table 16. World EV Battery Pack Thermal Conductive Gel Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key EV Battery Pack Thermal Conductive Gel Producers in 2025

Table 18. World EV Battery Pack Thermal Conductive Gel Production by Manufacturer (2021-2026) & (kg)

Table 19. Production Market Share of Key EV Battery Pack Thermal Conductive Gel Producers in 2025

Table 20. World EV Battery Pack Thermal Conductive Gel Average Price by Manufacturer (2021-2026) & (US\$/kg)

Table 21. Global EV Battery Pack Thermal Conductive Gel Company Evaluation Quadrant

Table 22. World EV Battery Pack Thermal Conductive Gel Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and EV Battery Pack Thermal Conductive Gel Production Site of Key Manufacturer

Table 24. EV Battery Pack Thermal Conductive Gel Market: Company Product Type Footprint

Table 25. EV Battery Pack Thermal Conductive Gel Market: Company Product Application Footprint

Table 26. EV Battery Pack Thermal Conductive Gel Competitive Factors

Table 27. EV Battery Pack Thermal Conductive Gel New Entrant and Capacity Expansion Plans

Table 28. EV Battery Pack Thermal Conductive Gel Mergers & Acquisitions Activity

Table 29. United States VS China EV Battery Pack Thermal Conductive Gel Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China EV Battery Pack Thermal Conductive Gel Production Comparison, (2021 & 2025 & 2032) & (kg)

Table 31. United States VS China EV Battery Pack Thermal Conductive Gel Consumption Comparison, (2021 & 2025 & 2032) & (kg)

Table 32. United States Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production (2021-2026) & (kg)

Table 36. United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share (2021-2026)

Table 37. China Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers EV Battery Pack Thermal Conductive Gel

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production, (2021-2026) & (kg)

Table 41. China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share (2021-2026)

Table 42. Rest of World Based EV Battery Pack Thermal Conductive Gel Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production, (2021-2026) & (kg)

Table 46. Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share (2021-2026)

Table 47. World EV Battery Pack Thermal Conductive Gel Production Value by Thermal Conductivity, (USD Million), 2021 & 2025 & 2032

Table 48. World EV Battery Pack Thermal Conductive Gel Production by Thermal Conductivity (2021-2026) & (kg)

Table 49. World EV Battery Pack Thermal Conductive Gel Production by Thermal Conductivity (2027-2032) & (kg)

Table 50. World EV Battery Pack Thermal Conductive Gel Production Value by Thermal Conductivity (2021-2026) & (USD Million)

Table 51. World EV Battery Pack Thermal Conductive Gel Production Value by Thermal Conductivity (2027-2032) & (USD Million)

Table 52. World EV Battery Pack Thermal Conductive Gel Average Price by Thermal Conductivity (2021-2026) & (US\$/kg)

Table 53. World EV Battery Pack Thermal Conductive Gel Average Price by Thermal Conductivity (2027-2032) & (US\$/kg)

Table 54. World EV Battery Pack Thermal Conductive Gel Production Value by Material System, (USD Million), 2021 & 2025 & 2032

Table 55. World EV Battery Pack Thermal Conductive Gel Production by Material System (2021-2026) & (kg)

Table 56. World EV Battery Pack Thermal Conductive Gel Production by Material System (2027-2032) & (kg)

Table 57. World EV Battery Pack Thermal Conductive Gel Production Value by Material System (2021-2026) & (USD Million)

Table 58. World EV Battery Pack Thermal Conductive Gel Production Value by Material System (2027-2032) & (USD Million)

Table 59. World EV Battery Pack Thermal Conductive Gel Average Price by Material System (2021-2026) & (US\$/kg)

Table 60. World EV Battery Pack Thermal Conductive Gel Average Price by Material System (2027-2032) & (US\$/kg)

Table 61. World EV Battery Pack Thermal Conductive Gel Production Value by Viscosity, (USD Million), 2021 & 2025 & 2032

Table 62. World EV Battery Pack Thermal Conductive Gel Production by Viscosity (2021-2026) & (kg)

Table 63. World EV Battery Pack Thermal Conductive Gel Production by Viscosity (2027-2032) & (kg)

Table 64. World EV Battery Pack Thermal Conductive Gel Production Value by Viscosity (2021-2026) & (USD Million)

Table 65. World EV Battery Pack Thermal Conductive Gel Production Value by Viscosity (2027-2032) & (USD Million)

Table 66. World EV Battery Pack Thermal Conductive Gel Average Price by Viscosity (2021-2026) & (US\$/kg)

Table 67. World EV Battery Pack Thermal Conductive Gel Average Price by Viscosity (2027-2032) & (US\$/kg)

Table 68. World EV Battery Pack Thermal Conductive Gel Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World EV Battery Pack Thermal Conductive Gel Production by Application (2021-2026) & (kg)

Table 70. World EV Battery Pack Thermal Conductive Gel Production by Application (2027-2032) & (kg)

Table 71. World EV Battery Pack Thermal Conductive Gel Production Value by Application (2021-2026) & (USD Million)

Table 72. World EV Battery Pack Thermal Conductive Gel Production Value by Application (2027-2032) & (USD Million)

Table 73. World EV Battery Pack Thermal Conductive Gel Average Price by Application (2021-2026) & (US\$/kg)

Table 74. World EV Battery Pack Thermal Conductive Gel Average Price by Application (2027-2032) & (US\$/kg)

Table 75. Henkel AG & Co. KGaA Basic Information, Manufacturing Base and Competitors

Table 76. Henkel AG & Co. KGaA Major Business

Table 77. Henkel AG & Co. KGaA EV Battery Pack Thermal Conductive Gel Product and Services

Table 78. Henkel AG & Co. KGaA EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 79. Henkel AG & Co. KGaA Recent Developments/Updates

Table 80. Henkel AG & Co. KGaA Competitive Strengths & Weaknesses

Table 81. Dow Inc. Basic Information, Manufacturing Base and Competitors

Table 82. Dow Inc. Major Business

Table 83. Dow Inc. EV Battery Pack Thermal Conductive Gel Product and Services

Table 84. Dow Inc. EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Dow Inc. Recent Developments/Updates

Table 86. Dow Inc. Competitive Strengths & Weaknesses

Table 87. Shin-Etsu Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 88. Shin-Etsu Chemical Co., Ltd. Major Business

Table 89. Shin-Etsu Chemical Co., Ltd. EV Battery Pack Thermal Conductive Gel Product and Services

Table 90. Shin-Etsu Chemical Co., Ltd. EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

Table 92. Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 93. Momentive Performance Materials Basic Information, Manufacturing Base and Competitors

Table 94. Momentive Performance Materials Major Business

Table 95. Momentive Performance Materials EV Battery Pack Thermal Conductive Gel Product and Services

Table 96. Momentive Performance Materials EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Momentive Performance Materials Recent Developments/Updates

Table 98. Momentive Performance Materials Competitive Strengths & Weaknesses

Table 99. Wacker Chemie AG Basic Information, Manufacturing Base and Competitors

Table 100. Wacker Chemie AG Major Business

Table 101. Wacker Chemie AG EV Battery Pack Thermal Conductive Gel Product and Services

Table 102. Wacker Chemie AG EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Wacker Chemie AG Recent Developments/Updates

Table 104. Wacker Chemie AG Competitive Strengths & Weaknesses

Table 105. Parker Hannifin Corporation Basic Information, Manufacturing Base and Competitors

Table 106. Parker Hannifin Corporation Major Business

Table 107. Parker Hannifin Corporation EV Battery Pack Thermal Conductive Gel Product and Services

Table 108. Parker Hannifin Corporation EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Parker Hannifin Corporation Recent Developments/Updates

Table 110. Parker Hannifin Corporation Competitive Strengths & Weaknesses

Table 111. Laird Performance Materials Basic Information, Manufacturing Base and Competitors

Table 112. Laird Performance Materials Major Business

Table 113. Laird Performance Materials EV Battery Pack Thermal Conductive Gel Product and Services

Table 114. Laird Performance Materials EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Laird Performance Materials Recent Developments/Updates

Table 116. Laird Performance Materials Competitive Strengths & Weaknesses

Table 117. Fujipoly Basic Information, Manufacturing Base and Competitors

Table 118. Fujipoly Major Business

Table 119. Fujipoly EV Battery Pack Thermal Conductive Gel Product and Services

Table 120. Fujipoly EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Fujipoly Recent Developments/Updates

Table 122. Fujipoly Competitive Strengths & Weaknesses

Table 123. Rogers Corporation Basic Information, Manufacturing Base and Competitors

Table 124. Rogers Corporation Major Business

Table 125. Rogers Corporation EV Battery Pack Thermal Conductive Gel Product and Services

Table 126. Rogers Corporation EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Rogers Corporation Recent Developments/Updates

Table 128. Rogers Corporation Competitive Strengths & Weaknesses

Table 129. Shenzhen FRD Science & Technology Basic Information, Manufacturing Base and Competitors

Table 130. Shenzhen FRD Science & Technology Major Business

Table 131. Shenzhen FRD Science & Technology EV Battery Pack Thermal Conductive Gel Product and Services

Table 132. Shenzhen FRD Science & Technology EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Shenzhen FRD Science & Technology Recent Developments/Updates

Table 134. Shenzhen FRD Science & Technology Competitive Strengths & Weaknesses

Table 135. Suzhou Anjie Technology Basic Information, Manufacturing Base and Competitors

Table 136. Suzhou Anjie Technology Major Business

Table 137. Suzhou Anjie Technology EV Battery Pack Thermal Conductive Gel Product and Services

Table 138. Suzhou Anjie Technology EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Suzhou Anjie Technology Recent Developments/Updates

Table 140. Suzhou Anjie Technology Competitive Strengths & Weaknesses

Table 141. Dongguan Betterly Basic Information, Manufacturing Base and Competitors

Table 142. Dongguan Betterly Major Business

Table 143. Dongguan Betterly EV Battery Pack Thermal Conductive Gel Product and Services

Table 144. Dongguan Betterly EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Dongguan Betterly Recent Developments/Updates

Table 146. Dongguan Betterly Competitive Strengths & Weaknesses

Table 147. LG Chem Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. LG Chem Ltd. Major Business

Table 149. LG Chem Ltd. EV Battery Pack Thermal Conductive Gel Product and Services

Table 150. LG Chem Ltd. EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. LG Chem Ltd. Recent Developments/Updates

Table 152. LG Chem Ltd. Competitive Strengths & Weaknesses

Table 153. KCC Corporation Basic Information, Manufacturing Base and Competitors

Table 154. KCC Corporation Major Business

Table 155. KCC Corporation EV Battery Pack Thermal Conductive Gel Product and

## Services

Table 156. KCC Corporation EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. KCC Corporation Recent Developments/Updates

Table 158. KCC Corporation Competitive Strengths & Weaknesses

Table 159. Eternal Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. Eternal Materials Co., Ltd. Major Business

Table 161. Eternal Materials Co., Ltd. EV Battery Pack Thermal Conductive Gel Product and Services

Table 162. Eternal Materials Co., Ltd. EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Eternal Materials Co., Ltd. Recent Developments/Updates

Table 164. Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 165. Huntsman Corporation Basic Information, Manufacturing Base and Competitors

Table 166. Huntsman Corporation Major Business

Table 167. Huntsman Corporation EV Battery Pack Thermal Conductive Gel Product and Services

Table 168. Huntsman Corporation EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Huntsman Corporation Recent Developments/Updates

Table 170. Huntsman Corporation Competitive Strengths & Weaknesses

Table 171. Indium Corporation Basic Information, Manufacturing Base and Competitors

Table 172. Indium Corporation Major Business

Table 173. Indium Corporation EV Battery Pack Thermal Conductive Gel Product and Services

Table 174. Indium Corporation EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Indium Corporation Recent Developments/Updates

Table 176. Indium Corporation Competitive Strengths & Weaknesses

Table 177. Master Bond Inc. Basic Information, Manufacturing Base and Competitors

Table 178. Master Bond Inc. Major Business

Table 179. Master Bond Inc. EV Battery Pack Thermal Conductive Gel Product and Services

Table 180. Master Bond Inc. EV Battery Pack Thermal Conductive Gel Production (kg), Price (US\$/kg), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Master Bond Inc. Recent Developments/Updates

Table 182. Master Bond Inc. Competitive Strengths & Weaknesses

Table 183. Global Key Players of EV Battery Pack Thermal Conductive Gel Upstream (Raw Materials)

Table 184. Global EV Battery Pack Thermal Conductive Gel Typical Customers

Table 185. EV Battery Pack Thermal Conductive Gel Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. EV Battery Pack Thermal Conductive Gel Picture

Figure 2. World EV Battery Pack Thermal Conductive Gel Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World EV Battery Pack Thermal Conductive Gel Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 5. World EV Battery Pack Thermal Conductive Gel Average Price (2021-2032) & (US\$/kg)

Figure 6. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Region (2021-2032)

Figure 7. World EV Battery Pack Thermal Conductive Gel Production Market Share by Region (2021-2032)

Figure 8. North America EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 9. Europe EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 10. China EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 11. Japan EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 12. India EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 13. Southeast Asia EV Battery Pack Thermal Conductive Gel Production (2021-2032) & (kg)

Figure 14. EV Battery Pack Thermal Conductive Gel Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 17. World EV Battery Pack Thermal Conductive Gel Consumption Market Share by Region (2021-2032)

Figure 18. United States EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 19. China EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 20. Europe EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 21. Japan EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 22. South Korea EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 23. ASEAN EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 24. India EV Battery Pack Thermal Conductive Gel Consumption (2021-2032) & (kg)

Figure 25. Producer Shipments of EV Battery Pack Thermal Conductive Gel by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for EV Battery Pack Thermal Conductive Gel Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for EV Battery Pack Thermal Conductive Gel Markets in 2025

Figure 28. United States VS China: EV Battery Pack Thermal Conductive Gel Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: EV Battery Pack Thermal Conductive Gel Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: EV Battery Pack Thermal Conductive Gel Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share 2025

Figure 32. China Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share 2025

Figure 33. Rest of World Based Manufacturers EV Battery Pack Thermal Conductive Gel Production Market Share 2025

Figure 34. World EV Battery Pack Thermal Conductive Gel Production Value by Thermal Conductivity, (USD Million), 2021 & 2025 & 2032

Figure 35. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Thermal Conductivity in 2025

Figure 36. Below 2 W

Figure 37. 2–4 W

Figure 38. 4–6 W

Figure 39. Above 6 W

Figure 40. World EV Battery Pack Thermal Conductive Gel Production Market Share by Thermal Conductivity (2021-2032)

Figure 41. World EV Battery Pack Thermal Conductive Gel Production Value Market

Share by Thermal Conductivity (2021-2032)

Figure 42. World EV Battery Pack Thermal Conductive Gel Average Price by Thermal Conductivity (2021-2032) & (US\$/kg)

Figure 43. World EV Battery Pack Thermal Conductive Gel Production Value by Material System, (USD Million), 2021 & 2025 & 2032

Figure 44. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Material System in 2025

Figure 45. Silicone-based Gel

Figure 46. Polyurethane-based Gel

Figure 47. Hybrid Polymer Gel

Figure 48. Others

Figure 49. World EV Battery Pack Thermal Conductive Gel Production Market Share by Material System (2021-2032)

Figure 50. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Material System (2021-2032)

Figure 51. World EV Battery Pack Thermal Conductive Gel Average Price by Material System (2021-2032) & (US\$/kg)

Figure 52. World EV Battery Pack Thermal Conductive Gel Production Value by Viscosity, (USD Million), 2021 & 2025 & 2032

Figure 53. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Viscosity in 2025

Figure 54. Low viscosity (500,000 cP)

Figure 57. Others

Figure 58. World EV Battery Pack Thermal Conductive Gel Production Market Share by Viscosity (2021-2032)

Figure 59. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Viscosity (2021-2032)

Figure 60. World EV Battery Pack Thermal Conductive Gel Average Price by Viscosity (2021-2032) & (US\$/kg)

Figure 61. World EV Battery Pack Thermal Conductive Gel Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Application in 2025

Figure 63. Battery Cell-to-Cold Plate Thermal Interface

Figure 64. Battery Module Gap Filling

Figure 65. Cell-to-Pack (CTP) Thermal Management

Figure 66. Cell-to-Chassis (CTC) Thermal Management

Figure 67. Others

Figure 68. World EV Battery Pack Thermal Conductive Gel Production Market Share by

Application (2021-2032)

Figure 69. World EV Battery Pack Thermal Conductive Gel Production Value Market Share by Application (2021-2032)

Figure 70. World EV Battery Pack Thermal Conductive Gel Average Price by Application (2021-2032) & (US\$/kg)

Figure 71. EV Battery Pack Thermal Conductive Gel Industry Chain

Figure 72. EV Battery Pack Thermal Conductive Gel Procurement Model

Figure 73. EV Battery Pack Thermal Conductive Gel Sales Model

Figure 74. EV Battery Pack Thermal Conductive Gel Sales Channels, Direct Sales, and Distribution

Figure 75. Methodology

Figure 76. Research Process and Data Source

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