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Global EV Battery Pack Thermal Conductive Gel 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 EV Battery Pack Thermal Conductive Gel market size was valued at US$ 643 million in 2025 and is forecast to a readjusted size of US$ 1583 million by 2032 with a CAGR of 13.9% during review period.

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

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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.

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This report is a detailed and comprehensive analysis for global EV Battery Pack Thermal Conductive Gel market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Thermal Conductivity 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 EV Battery Pack Thermal Conductive Gel market size and forecasts, in consumption value ($ Million), sales quantity (kg), and average selling prices (US$/kg), 2021-2032

Global EV Battery Pack Thermal Conductive Gel market size and forecasts by region and country, in consumption value ($ Million), sales quantity (kg), and average selling prices (US$/kg), 2021-2032

Global EV Battery Pack Thermal Conductive Gel market size and forecasts, by Thermal Conductivity and by Application, in consumption value ($ Million), sales quantity (kg), and average selling prices (US$/kg), 2021-2032

Global EV Battery Pack Thermal Conductive Gel market shares of main players, shipments in revenue ($ Million), sales quantity (kg), 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 EV Battery Pack Thermal Conductive Gel

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 EV Battery Pack Thermal Conductive Gel market based on the following parameters - company overview, sales quantity, revenue,

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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.

Market Segmentation

EV Battery Pack Thermal Conductive Gel market is split by Thermal Conductivity and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Thermal Conductivity, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Thermal Conductivity

Below 2 W

2–4 W

4–6 W

Above 6 W

Market segment by Material System

Silicone-based Gel

Polyurethane-based Gel

Hybrid Polymer Gel

Others

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Market segment by Viscosity

- Low viscosity (500,000 cP)
- Others

Market segment 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

Major players covered

- 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

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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.

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe EV Battery Pack Thermal Conductive Gel product scope, market overview, market estimation caveats and base year.

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Chapter 2, to profile the top manufacturers of EV Battery Pack Thermal Conductive Gel, with price, sales quantity, revenue, and global market share of EV Battery Pack Thermal Conductive Gel from 2021 to 2026.

Chapter 3, the EV Battery Pack Thermal Conductive Gel competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the EV Battery Pack Thermal Conductive Gel breakdown 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 Thermal Conductivity and by Application, with sales market share and growth rate by Thermal Conductivity, 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 EV Battery Pack Thermal Conductive Gel market forecast, by regions, by Thermal Conductivity, 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 EV Battery Pack Thermal Conductive Gel.

Chapter 14 and 15, to describe EV Battery Pack Thermal Conductive Gel sales channel, distributors, customers, research findings and conclusion.

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