

Global Heat-conducting Silica Gel Sheet Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heat-conducting Silica Gel Sheet market size is expected to reach \$ 1792 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Heat-conducting silica gel sheets are pre-formed, flexible thermal interface materials based on silicone rubber or silicone elastomers. They are manufactured through processes such as compounding, calendaring or coating, vulcanization, lamination, and die-cutting, utilizing a high loading of electrically insulating, thermally conductive fillers—such as aluminum oxide, magnesium oxide, boron nitride, and aluminum nitride. Typically placed between heat-generating components (e.g., chips, power devices, batteries, and power modules) and heat sinks, metal housings, or cold plates, these pads conform under compression to fill microscopic surface irregularities and assembly gaps, thereby reducing contact thermal resistance. They also provide electrical insulation, shock absorption, and ease of assembly. Key applications include consumer electronics (CPUs/GPUs, smartphones, tablets, and laptops); telecommunications and data centers (servers, switches, 5G equipment, and high-power power supplies); new energy vehicles (battery modules, BMS, OBC, DC/DC converters, inverters, and domain controllers); as well as industrial control systems, LED lighting, medical equipment, aerospace, and other power electronics sectors.

Key Findings

Global production volume of heat-conducting silicone pads is approximately 41,300 metric tons in 2025.

The global average selling price is approximately \$27.9 per kilogram in 2025.

The Asia-Pacific region is the most important global hub for both production and consumption.

Consumer electronics, data centers, and automotive electronics are the core demand sectors.

Key areas for product upgrades include high thermal conductivity, low hardness, and low interfacial thermal resistance.

Market Trends

Heat-conducting silicone pads are evolving from traditional general-purpose pads (1–3 W/(m·K)) toward products featuring high thermal conductivity, ultra-softness, low compressive stress, low outgassing, and long-term reliability. Evaluation criteria are shifting from nominal material thermal conductivity to actual interfacial thermal resistance, compression curves, thermal cycling stability, and long-term deformation retention. As heat flux densities rise in AI servers, GPUs, communication infrastructure, and power electronics for new energy vehicles, the application scope for products with thermal conductivities of 6–12 W/(m·K) and higher continues to expand. Simultaneously, features such as ultra-thin profiles, fiberglass or PI reinforcement, single-sided low tack, reworkability, and precision die-cutting for complex shapes are becoming critical to supporting automated assembly processes at the end-user level.

Market Dynamics

Drivers

Market demand is primarily driven by the continuous increase in power density within electronic components. CPUs, GPUs, ASICs, power semiconductors, and highly integrated power modules generate more heat within limited spatial constraints, necessitating the use of flexible heat-conducting pads to fill tolerances and air gaps between chips and heat dissipation structures. The proliferation of high-heat-generating electronic components in new energy vehicles—such as batteries, BMS, OBCs, DC/DC converters, inverters, ADAS, and domain controllers—is driving increased demand for

silicone pads that offer insulation, cushioning, and thermal conductivity. Upgrades in servers, telecommunications equipment, and industrial electronics provide another key pillar of demand.

Restraints

Thermal silicone pads involve inherent trade-offs between thermal conductivity, softness, cost, and reliability. Enhancing thermal performance typically requires increasing the loading of fillers like ceramics or boron nitride (BN); however, high filler content raises material hardness and density, reduces conformability to uneven surfaces, and may increase compressive stress on components. Conversely, the high cost of high-performance fillers like BN and AlN compared to standard alumina limits the rapid penetration of ultra-high thermal conductivity products into price-sensitive markets. Additionally, siloxane volatilization and silicone oil bleeding pose constraints in silicone-sensitive applications such as optics, hard drives, and precision sensing; consequently, silicone-free thermal pads, gels, liquid gap fillers, and carbon fiber materials are emerging as competitive alternatives.

Opportunities

Future growth will center on AI data centers, advanced computing, new energy vehicles, and high-power telecommunications equipment. As the power output of GPUs and AI accelerators rises, server motherboards, power supplies, optical modules, and high-speed switching equipment require higher-performance gap pads. Meanwhile, the evolution of automotive electronics—driven by high-voltage platforms, SiC devices, ADAS, and domain controllers—demands materials that offer high voltage resistance, low stress, minimal outgassing/bleeding, and stability during long-term thermal cycling. High-end products can also increase per-unit value through functional integration—combining thermal conductivity with EMI absorption, electrical insulation, flame retardancy, and vibration damping; for instance, Henkel has developed a gap pad portfolio that offers both thermal conductivity and EMI attenuation.

Challenges

The primary industry challenges stem from the rapid pace of technological iteration in downstream sectors, coupled with stringent customer certification processes and material consistency requirements. High-performance thermal pads must not only meet

thermal conductivity benchmarks but also maintain consistent hardness, thickness tolerances, compression recovery, dielectric strength, flame retardancy, silicone oil bleeding characteristics, and thermal aging performance over the long term; fluctuations in material formulations or processing parameters can directly impact interfacial thermal resistance. Clients in the high-end automotive, server, and telecommunications sectors typically require long-term reliability validation and precision die-cutting support; once a supplier enters the mass production supply chain, stringent demands for quality consistency apply.

Industry Chain Analysis

The upstream segment primarily comprises silicone rubber, silicone polymers, and cross-linking systems, alongside thermally conductive and electrically insulating fillers (such as aluminum oxide, magnesium oxide, zinc oxide, boron nitride, and aluminum nitride) and auxiliaries (including fiberglass, PI/PET reinforcing films, pressure-sensitive adhesives, release liners, and flame retardants). The midstream segment involves high-filler compounding, vacuum degassing, calendaring or coating, vulcanization, lamination, thickness and hardness control, surface tack adjustment, and precision die-cutting; value creation is gradually shifting from standard sheet production toward customized sizes, die-cut components, and collaborative thermal design with end-users. The downstream segment encompasses consumer electronics, servers and telecommunications equipment, new energy vehicles (NEVs), industrial controls, power supplies, LEDs, and medical and aerospace equipment.

Segment Insights

In terms of performance and structure, the bulk of market sales still consists of general-purpose silicone pads—characterized by moderate thermal conductivity, reasonable costs, and good compressibility—serving consumer electronics, power supplies, telecommunications, and industrial equipment. However, driven by the rapid growth of AI computing, automotive electronics, and high-power devices, the value share of high-conductivity and ultra-high-conductivity products is steadily rising. Product design is also evolving from a sole focus on increasing thermal conductivity ($W/(m \cdot K)$) toward a combination of high thermal conductivity, low hardness, and low thermal resistance. Structurally, the market features a mix of standard bare sheets, fiberglass- or PI-reinforced sheets, single-sided adhesive-backed sheets, and custom die-cut parts; thin products emphasize low interfacial thermal resistance, whereas thicker "Gap Pads" are

primarily used to accommodate significant structural tolerances.

Downstream Market Opportunities

While consumer electronics continue to drive substantial baseline demand, opportunities for growth are clearly shifting toward AI and data centers, telecommunications infrastructure, and new energy vehicles. In data centers, components such as GPUs, CPUs, ASICs, power modules, and high-speed networking equipment require rapid heat dissipation within confined spaces, driving increased demand for thermal interface pads (Gap Pads) that offer low compressive stress and high thermal conductivity. The automotive sector encompasses power batteries, BMS, ECUs, ADAS, OBCs, and power conversion components, imposing stricter requirements regarding insulation, flame retardancy, vibration damping, and long-term aging stability. While the industrial, medical, and aerospace markets are relatively smaller in scale, they demand high reliability and extensive customization, thereby supporting higher-value specialty products.

Regional Insights

The Asia-Pacific region is the primary global hub for both the manufacturing and consumption of thermal interface pads. China, Japan, South Korea, and Taiwan host key supply chains for consumer electronics, semiconductor packaging, server components, communication equipment, and new energy vehicles, alongside a comprehensive supply ecosystem for silicone materials, ceramic fillers, and precision die-cutting services. Japan possesses strong technical expertise in areas such as high-thermal-conductivity filler orientation, ultra-soft silicone, and high-reliability formulations. China has leveraged its massive electronics manufacturing base to cultivate local suppliers such as Jones Tech, FEYONDA, Suzhou Tianmai, Aochuan Technology, and Zhaoke. Markets in North America and Europe focus more heavily on data centers, automotive electronics, industrial equipment, aerospace, and high-reliability applications.

Competitive Landscape Analysis

The market for thermal interface pads features a competitive landscape where diversified international materials manufacturers, specialized Thermal Interface Material

(TIM) companies, and local Chinese thermal management firms coexist. Japanese companies have established distinct technical strengths in boron nitride (BN) orientation, high-voltage resistance, and low-stress materials. Chinese companies possess manufacturing capabilities for thermal pads and silicone-based thermal sheets, offering both custom sheet materials and die-cut components. Gross margins for manufacturers in the industry typically range from 25% to 45%. Future competition will increasingly shift away from nominal thermal conductivity toward factors such as actual interfacial thermal resistance, compression reliability, material cleanliness, precision processing capabilities, and the ability to secure qualifications from leading customers.

Report Scope

This report studies the global Heat-conducting Silica Gel Sheet production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heat-conducting Silica Gel Sheet 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 Heat-conducting Silica Gel Sheet that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heat-conducting Silica Gel Sheet total production and demand, 2021-2032, (Kilotons)

Global Heat-conducting Silica Gel Sheet total production value, 2021-2032, (USD Million)

Global Heat-conducting Silica Gel Sheet production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Heat-conducting Silica Gel Sheet consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Heat-conducting Silica Gel Sheet domestic production,

consumption, key domestic manufacturers and share

Global Heat-conducting Silica Gel Sheet production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Heat-conducting Silica Gel Sheet production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Heat-conducting Silica Gel Sheet production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Heat-conducting Silica Gel Sheet 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 Adhesive Technologies, Laird, Parker Hannifin, 3M, Fujipoly America, Shin-Etsu Chemical, Suzhou Tianmai Thermal Technology, Sekisui Chemical, Dexerials, Denka, 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 Heat-conducting Silica Gel Sheet market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Heat-conducting Silica Gel Sheet Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Heat-conducting Silica Gel Sheet Market, Segmentation by Type:

Ultra-Soft Type

Low-Hardness Type

Standard-Hardness Type

Global Heat-conducting Silica Gel Sheet Market, Segmentation by Thermal Conductivity:

Standard Thermal Conductivity (approx. 1–3 W/m·K)

Medium-to-High Thermal Conductivity (approx. 3–6 W/m·K)

High Thermal Conductivity (approx. 6–10 W/m·K)

Ultra-High Thermal Conductivity (>10 W/m·K)

Global Heat-conducting Silica Gel Sheet Market, Segmentation by Thickness:

Ultra-thin Type (<0.5 mm)

Standard Type (0.5–2 mm)

Thick Type (>2 mm)

Global Heat-conducting Silica Gel Sheet Market, Segmentation by Structure:

Unsupported Type

Fiberglass-Reinforced Type

Pi Film-Reinforced Type

Single-Sided Adhesive Type

Double-Sided Adhesive Type

Global Heat-conducting Silica Gel Sheet Market, Segmentation by Application:

Consumer Electronics

Communication & Data Center

New Energy Vehicle (NEV)

Industrial Control

Aerospace

Others

Companies Profiled:

Henkel Adhesive Technologies

Laird

Parker Hannifin

3M

Fujipoly America

Shin-Etsu Chemical

Suzhou Tianmai Thermal Technology

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Keramische Folien

Boyd

JONES TECH

Shenzhen FRD Science & Technology

Shenzhen Aochuan Technology

Long Young Electronic (Kunshan)

Ziitek

Shenzhen Goldlink Tongda Electronics

Asink Green Material

Guangdong Kingbali New Material

Dongguan Sheen Electronic Technology

HUIWELL Thermal Management Technology (Dongguan

Shenzhen Beichuan Lihe Technology

Shenzhen duebang Technology

Shenzhen Union Tenda Technology

Shenzhen Youhede Electronics

Shenzhen Maoyuan New Material Technology

Key Questions Answered

1. How big is the global Heat-conducting Silica Gel Sheet market?
2. What is the demand of the global Heat-conducting Silica Gel Sheet market?
3. What is the year over year growth of the global Heat-conducting Silica Gel Sheet market?
4. What is the total value of the global Heat-conducting Silica Gel Sheet market?
5. Who are the Major Players in the global Heat-conducting Silica Gel Sheet market?
6. What are the growth factors driving the market demand?

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