

# Global High Thermal Conductivity Silicone Sheet Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global High Thermal Conductivity Silicone Sheet market size is expected to reach \$ 344 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

High thermal conductivity silicone sheets represent a high-performance category within the broader class of thermal interface materials. Typically composed of a silicone rubber or elastomer matrix heavily loaded with electrically insulating, thermally conductive fillers—such as aluminum oxide, magnesium oxide, boron nitride (BN), or aluminum nitride (AlN)—these sheets are manufactured through processes including compounding, calendaring or coating, vulcanization, lamination, and die-cutting. They serve as pre-formed, flexible thermal interface sheets designed to fill air gaps between heat sources (such as chips, power devices, or ASICs) and heat sinks, cold plates, or metal housings, thereby reducing interfacial thermal resistance. Key applications include AI server components (GPUs, CPUs, ASICs), high-speed switches and optical modules, high-power communication equipment, new energy vehicle systems (BMS, OBC, DC/DC converters, inverters, ADAS, and domain controllers), as well as industrial power supplies, power semiconductors, LEDs, medical equipment, and aerospace electronics.

## Key Findings

Global production of High Thermal Conductivity Silicone Sheet reached approximately 5,580 tons in 2025

The global average selling price was approximately US\$41.6/kg in 2025

Data centers and new energy vehicles are important incremental growth markets

Typical gross margins for manufacturers are estimated at approximately 25%–45%

## Market Trends

High Thermal Conductivity Silicone Sheet is evolving from a focus on nominal thermal conductivity alone toward a more comprehensive combination of high thermal conductivity, low interfacial thermal resistance, low hardness, low compression stress, and high reliability. Conventional approaches that simply increase ceramic filler loading to improve thermal conductivity often make the sheet harder. Therefore, leading manufacturers are increasingly adopting technologies such as oriented BN alignment, multi-particle-size filler grading, and low-modulus silicone formulations. Dexerials has achieved thermal conductivity of 11 W/(m·K) while maintaining flexibility through BN orientation technology, while Bando has achieved 17 W/(m·K) by orienting BN in the through-thickness direction, indicating that filler orientation is becoming an important technical route for overcoming the trade-off between high thermal conductivity and softness. Meanwhile, low oil bleeding, low-molecular-weight siloxane control, high dielectric strength, UL flame retardancy, thinner profiles, and long-term compression reliability are becoming increasingly important. In 2026, Parker introduced a low-oil-bleed, high-reliability Gap Pad with thermal conductivity of 12 W/(m·K), demonstrating that practical thermal resistance and long-term stability are increasingly replacing a single W/(m·K) specification as key evaluation criteria in the high-end market.

## Market Dynamics

### Drivers

The core drivers of market growth are the continued increase in heat flux density per unit area across AI computing infrastructure, new energy vehicles, and high-power electronic equipment. New energy vehicles are creating sustained demand. Global electric vehicle sales exceeded 20 million units in 2025, while the increasing number and power ratings of BMS, OBC, DC/DC converters, inverters, ADAS systems, and domain controllers are further expanding demand for silicone sheets featuring high

thermal conductivity, electrical insulation, and low compression stress.

## Restraints

There is a clear technical trade-off between high thermal conductivity and soft conformability. High loadings of alumina, BN, or AlN can improve thermal conductivity but may also increase hardness, density, and compression stress, thereby reducing the ability of the sheet to accommodate component height variations and surface roughness. Dexerials has explicitly noted that increasing the amount of high-thermal-conductivity filler in conventional formulations generally results in a harder sheet. In addition, BN, AlN, and specialty spherical fillers are more expensive than conventional alumina, while high-end products require more sophisticated surface treatment, filler orientation, and precision thickness control. Certain precision optical and connector applications are also sensitive to low-molecular-weight siloxanes and silicone oil bleeding, creating substitution pressure from silicone-free Gap Pads, thermal gels, and liquid Gap Fillers.

## Opportunities

AI servers and advanced computing represent the most important incremental growth opportunities. High-power GPUs, CPUs, ASICs, and 800G/1.6T and higher-speed networking equipment are driving significantly higher demand for sheet-type TIMs that combine high thermal conductivity with low compression stress. In new energy vehicles, the adoption of 800V high-voltage platforms, SiC power devices, and increasingly centralized electrical/electronic architectures is raising requirements for dielectric strength, thermal conductivity, and long-term thermal-cycle reliability. Shin-Etsu has introduced the EV-focused TC-BGI silicone sheet with thermal conductivity of 7 W/(m·K), a thickness of 0.2–0.3 mm, and enhanced high-voltage insulation performance. Meanwhile, manufacturers can increase unit value through ultra-soft, low-oil-bleed, glass-fiber/PI-reinforced, and precision die-cut products, while extending into thermal simulation, material selection, die-cutting, and assembly services to move from standalone material sales toward system-level thermal interface solutions.

## Challenges

The pace of technological upgrading is accelerating, and evaluation criteria among high-end customers have expanded from thermal conductivity alone to practical thermal

resistance, compression curves, resilience, hardness, dielectric breakdown strength, flame retardancy, oil bleeding, thermal aging, and batch-to-batch consistency. Qualification cycles are relatively long in automotive, AI server, communications, and aerospace applications, and formulation changes after mass production may trigger requalification, creating substantial customer-entry barriers for new suppliers. Meanwhile, Chinese manufacturers are continuously strengthening their supply capabilities in the 5–10 W/(m·K) range. Aochuan has established a complete product portfolio covering 5, 6, 8, 10, 12, and 15 W/(m·K), while Ziitek's silicone thermal pad portfolio extends to 18 W/(m·K). Price competition in the mid-range segment is therefore expected to intensify, requiring high-end manufacturers to maintain differentiation through low thermal resistance, low stress, low oil bleeding, and superior long-term reliability.

## Industry Chain Analysis

The upstream industry chain primarily includes silicone base polymers, silicone rubber and curing systems, thermally conductive and electrically insulating fillers such as alumina, magnesium oxide, BN, and AlN, as well as glass fiber, PI/PET reinforcement films, pressure-sensitive adhesives, release films, and flame-retardant additives. High-purity BN, AlN, and specialty spherical alumina are important sources of both cost and performance for high-end products. Midstream value creation is concentrated in filler particle-size grading, surface modification and orientation, high-loading compounding, vacuum degassing, calendaring/coating, curing, thickness and hardness control, surface tack adjustment, lamination, and precision die cutting. Downstream customers span AI servers and data centers, communications equipment, new energy vehicles, industrial power supplies, power semiconductors, consumer electronics, medical equipment, and aerospace applications.

## Segment Insights

By thermal conductivity level, products in the 5–8 W/(m·K) range remain the relatively mature mainstream segment of the High Thermal Conductivity Silicone Sheet market, offering a balance among cost, softness, and heat dissipation performance and being widely used in communications equipment, power supplies, industrial electronics, and automotive control modules. Products in the 8–12 W/(m·K) range primarily target servers, 5G equipment, automotive power electronics, and high-end computing equipment, requiring more advanced filler systems and low-stress designs. Products

above 12 W/(m·K) represent the high-end segment with the fastest pace of technological upgrading. As high-heat-flux applications expand, products above 10 W/(m·K) are expected to account for an increasing share of market value, although actual material selection will increasingly emphasize interfacial thermal resistance under equivalent pressure rather than nominal thermal conductivity alone.

## **Downstream Market Opportunities**

AI data centers, new energy vehicles, and high-power communications equipment are the downstream markets with the strongest growth potential for High Thermal Conductivity Silicone Sheet. AI servers require effective thermal management for GPUs, CPUs, ASICs, memory, power supplies, and high-speed networking components while accommodating high heat flux density and component height tolerances. Soft, high-thermal-conductivity Gap Pads can establish stable thermal pathways without imposing excessive mechanical stress on PCBs. In new energy vehicles, demand is increasingly focused on electrically insulating heat dissipation and long-term reliability for inverters, OBCs, DC/DC converters, BMS, ADAS systems, and domain controllers.

## **Regional Insights**

Asia-Pacific is the world's most important manufacturing and consumption region for High Thermal Conductivity Silicone Sheet, supported by concentrated supply chains for consumer electronics, server components, communications equipment, semiconductors, and new energy vehicles in China, Japan, and South Korea. Japanese companies maintain notable advantages in high-end material technologies, while China has developed a broad supplier base supported by its large-scale electronics manufacturing ecosystem, including T-Global, Jones Tech, Aochuan, Ziteck, Shengyuan, and Jinling Tongda. North American and European markets are more focused on AI computing, automotive, communications, aerospace, and high-reliability industrial electronics, where customer qualification requirements and application-engineering barriers for high-performance materials are comparatively high.

## **Competitive Landscape Analysis**

The global High Thermal Conductivity Silicone Sheet market is characterized by competition among international diversified materials companies, specialized Japanese

TIM manufacturers, and local Chinese thermal management material suppliers. In terms of profitability, typical gross margins for High Thermal Conductivity Silicone Sheet manufacturers are estimated at approximately 25%–45%. Standard high-thermal-conductivity products in the 5–8 W/(m·K) range tend to be closer to the lower end of this range, while products above 10 W/(m·K), as well as low-oil-bleed, ultra-soft, automotive-grade, and precision die-cut products, tend to be closer to the upper end.

## Report Scope

This report studies the global High Thermal Conductivity Silicone Sheet production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High Thermal Conductivity Silicone 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 High Thermal Conductivity Silicone Sheet that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global High Thermal Conductivity Silicone Sheet total production and demand, 2021-2032, (Tons)

Global High Thermal Conductivity Silicone Sheet total production value, 2021-2032, (USD Million)

Global High Thermal Conductivity Silicone Sheet production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global High Thermal Conductivity Silicone Sheet consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: High Thermal Conductivity Silicone Sheet domestic production, consumption, key domestic manufacturers and share

Global High Thermal Conductivity Silicone Sheet production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global High Thermal Conductivity Silicone Sheet production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global High Thermal Conductivity Silicone Sheet production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global High Thermal Conductivity Silicone 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, Parker Hannifin, Laird, Fujipoly America, Shin-Etsu Chemical, Denka, Dexerials, Taica, Keramische Folien, Boyd, 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 High Thermal Conductivity Silicone Sheet market

## **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## **Global High Thermal Conductivity Silicone Sheet Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## **Market Segmentation**

### **Global High Thermal Conductivity Silicone Sheet Market, Segmentation by Type:**

5–8 W/(m·K) High Thermal Conductivity Type

8–12 W/(m·K) Ultra-High Thermal Conductivity Type

>12 W/(m·K) Extremely High Thermal Conductivity Type

### **Global High Thermal Conductivity Silicone Sheet Market, Segmentation by Thermal Filler:**

Alumina-Based

BN-Based

AlN-Based

Composite Filler Type

### **Global High Thermal Conductivity Silicone Sheet Market,**

*Global High Thermal Conductivity Silicone Sheet Supply, Demand and Key Producers, 2026-2032*

## **Segmentation by Thickness:**

0.2–0.5 mm Ultra-Thin Type

0.5–2 mm Standard Type

> 2 mm Thick Type

## **Global High Thermal Conductivity Silicone Sheet Market, Segmentation by Application:**

Consumer Electronics

Communication & Data Center

New Energy Vehicle (NEV)

Industrial Control

Aerospace

Others

## **Companies Profiled:**

Henkel Adhesive Technologies

Parker Hannifin

Laird

Fujipoly America

Shin-Etsu Chemical

Denka

Dexerials

Taica

Keramische Folien

Boyd

T-Global Technology

Sekisui Chemical

Bando Chemical Industries

JONES TECH

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Ziitek

Shenzhen Union Tenda Technology

Long Young Electronic (Kunshan)

Guangdong Kingbali New Material

Asink Green Material

Dongguan Sheen Electronic Technology

Shenzhen duebang Technology

Shenzhen Beichuan Lihe Technology

HUIWELL Thermal Management Technology (Dongguan

Shenzhen Goldlink Tongda Electronics

## Key Questions Answered

1. How big is the global High Thermal Conductivity Silicone Sheet market?
2. What is the demand of the global High Thermal Conductivity Silicone Sheet market?
3. What is the year over year growth of the global High Thermal Conductivity Silicone Sheet market?
4. What is the total value of the global High Thermal Conductivity Silicone Sheet market?
5. Who are the Major Players in the global High Thermal Conductivity Silicone Sheet market?
6. What are the growth factors driving the market demand?

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