

Global New Energy Vehicle Thermal Conductive Potting Adhesive Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global New Energy Vehicle Thermal Conductive Potting Adhesive market size is expected to reach \$ 1121 million by 2032, rising at a market growth of 9.9% CAGR during the forecast period (2026-2032).

New energy vehicle thermal conductive potting adhesives are liquid, thermally conductive, and electrically insulating materials designed for the powertrains and automotive electronic components of vehicles such as BEVs and PHEVs. Typically based on silicone, polyurethane, or epoxy resin matrices, these adhesives incorporate thermally conductive and electrically insulating fillers (e.g., aluminum oxide, aluminum hydroxide, magnesium oxide, boron nitride, aluminum nitride) alongside additives such as flame retardants, coupling agents, and catalysts. Applied via casting, vacuum potting, or automated dispensing followed by curing, they fill air gaps within components, windings, circuit boards, or housings while providing thermal conduction, electrical insulation, moisture/water resistance, vibration resistance, mechanical protection, and flame retardancy. Key downstream applications include power batteries and BMS, On-Board Chargers (OBCs), DC/DC converters, drive inverters, motor stators/electric drive systems, power modules, ECUs, and other high-power automotive electronics. Manufacturers typically achieve gross margins of approximately 20%–35%.

The upstream supply chain primarily consists of resin raw materials (e.g., silicone base polymers, epoxy resins, polyether/polyester polyols, and isocyanates), thermally conductive/insulating fillers (e.g., aluminum oxide, aluminum hydroxide, magnesium oxide, boron nitride, aluminum nitride), and functional additives (e.g., flame retardants, curing agents, catalysts, and coupling agents). The midstream segment encompasses formulation design, filler particle size grading and surface treatment, high-loading

dispersion, vacuum mixing and degassing, viscosity and thixotropy control, two-component mixing ratio design, potting process adaptation, and curing, as well as reliability verification regarding thermal cycling, dielectric properties, flame retardancy, and vibration resistance. The downstream market serves vehicle manufacturers (OEMs). In terms of regional distribution, the production and consumption of thermal potting compounds for new energy vehicles (NEVs) are heavily concentrated in the Asia-Pacific region, a pattern largely driven by the locations of EV and power battery manufacturing. Europe constitutes the second-largest region, supported by vehicle, electric drive, and battery manufacturing in countries such as Germany, France, and Hungary; meanwhile, the North American market is primarily driven by the localized production of EVs, power batteries, and power electronics in the United States and Mexico. Future market growth will stem not only from rising NEV sales volumes but also from simultaneous increases in per-vehicle usage and performance standards. The market focus will shift from a singular emphasis on thermal conductivity to factors such as thermal conductivity per unit weight, low-viscosity/high-filler loading technologies, low density, automated 1:1 ratio metering and potting, rapid curing, bubble-free reliability, flame-retardant safety, and the ability to meet long-term automotive-grade certification requirements set by OEMs.

Report Scope

This report studies the global New Energy Vehicle Thermal Conductive Potting Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for New Energy Vehicle Thermal Conductive Potting Adhesive 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 New Energy Vehicle Thermal Conductive Potting Adhesive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global New Energy Vehicle Thermal Conductive Potting Adhesive total production and demand, 2021-2032, (Tons)

Global New Energy Vehicle Thermal Conductive Potting Adhesive total

production value, 2021-2032, (USD Million)

Global New Energy Vehicle Thermal Conductive Potting Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global New Energy Vehicle Thermal Conductive Potting Adhesive consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: New Energy Vehicle Thermal Conductive Potting Adhesive domestic production, consumption, key domestic manufacturers and share

Global New Energy Vehicle Thermal Conductive Potting Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global New Energy Vehicle Thermal Conductive Potting Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global New Energy Vehicle Thermal Conductive Potting Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global New Energy Vehicle Thermal Conductive Potting Adhesive 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, Dow, Momentive Performance Materials, Wacker Chemie, Parker Hannifin, Bluestar Silicones, WEVO-CHEMIE, CHT Group, Shin-Etsu Chemical, Sika, 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 New Energy Vehicle Thermal Conductive Potting Adhesive market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 New Energy Vehicle Thermal Conductive Potting Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global New Energy Vehicle Thermal Conductive Potting Adhesive Market, Segmentation by Type:

Standard thermal conductivity (approx. ≥ 1.0 W/(m·K))

Medium-to-high thermal conductivity (approx. 1.0–2.0 W/(m·K))

High thermal conductivity (> 2.0 W/(m·K))

Global New Energy Vehicle Thermal Conductive Potting Adhesive Market, Segmentation by Base Material:

Silicone-based

Polyurethane-based

Epoxy-based

Global New Energy Vehicle Thermal Conductive Potting Adhesive Market, Segmentation by Component:

Single-component

Two-component

Global New Energy Vehicle Thermal Conductive Potting Adhesive Market, Segmentation by Application:

Battery Electric Vehicle (BEV)

Plug-in Hybrid Electric Vehicle (PHEV)

Companies Profiled:

Henkel

Dow

Momentive Performance Materials

Wacker Chemie

Parker Hannifin

Bluestar Silicones

WEVO-CHEMIE

CHT Group

Shin-Etsu Chemical

Sika

H.B. Fuller

MacDermid Alpha

Master Bond

Huitian New Material

Guangzhou Jointas Chemical

Dongguan Jiadi New Materials

Shanghai Beginor Technology

Shenzhen Aochuan Technology

Dongguan XinEu Electronic Technology

Key Questions Answered

1. How big is the global New Energy Vehicle Thermal Conductive Potting Adhesive market?
2. What is the demand of the global New Energy Vehicle Thermal Conductive Potting Adhesive market?
3. What is the year over year growth of the global New Energy Vehicle Thermal Conductive Potting Adhesive market?
4. What is the total value of the global New Energy Vehicle Thermal Conductive Potting

Adhesive market?

5. Who are the Major Players in the global New Energy Vehicle Thermal Conductive Potting Adhesive market?

6. What are the growth factors driving the market demand?

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