

Global Non-Silicone Gap Filler Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-Silicone Gap Filler market size is expected to reach \$ 1127 million by 2032, rising at a market growth of 8.4% CAGR during the forecast period (2026-2032).

In 2025, global Non-Silicone Gap Filler production reached approximately 18,200 tons, with an average global market price of around 34/kg.

Non-Silicone Gap Filler is a thermally conductive interface material formulated without silicone-based polymers or silicone oils, designed to fill macroscopic gaps, surface irregularities and height tolerances between heat-generating components and heat sinks, cooling plates or device enclosures. It replaces thermally insulating air with a compliant heat-transfer medium, thereby reducing contact thermal resistance and improving heat dissipation while minimizing mechanical stress on sensitive components. Common binder systems include polyurethane, acrylic, epoxy, silane-modified polymer and other synthetic resins, combined with thermally conductive fillers such as alumina, aluminum nitride, boron nitride, magnesium oxide or graphite. Products are supplied as pads, sheets, putties, gels or one- and two-component dispensable compounds and are particularly suitable for optical devices, camera modules, relays, sensors, automotive electronics and other silicone-sensitive applications where siloxane volatilization, oil bleeding or electrical-contact contamination must be avoided.

The average single-line production capacity of Non-Silicone Gap Filler is 800 tons, the average gross profit margin was 33.4%.

The upstream sector supplies polyurethane, acrylic and other non-silicone resins, thermally conductive ceramic or carbon fillers, flame retardants, coupling agents, backing films and packaging materials. Midstream manufacturers conduct formulation

development, mixing, dispersion, coating, curing, sheet forming, die-cutting, filling and performance testing to produce gap-filler pads, gels, putties and dispensable compounds. Downstream demand comes mainly from consumer electronics, automotive electronics and EV batteries, telecommunications, data centers, optical equipment, industrial electronics, aerospace and energy-storage systems.

Raw materials account for approximately 55%–65% of total cost, including thermally conductive fillers at 30%–38%, non-silicone resins at 15%–20%, and additives, films and packaging at 8%–10%. Manufacturing labor represents about 8%–12%, equipment depreciation and energy 8%–10%, R&D and quality testing 7%–10%, and other factory, logistics and management expenses approximately 10%–15%.

Demand is being driven by rising power density in AI servers, EV batteries, energy-storage systems, optical modules and compact electronics, alongside stricter requirements for low outgassing, contamination control and automated dispensing. Business opportunities are strongest in high-thermal-conductivity materials, fast-dispensing two-component formulations, low-density EV battery products, ultra-low-outgassing optical grades and customized die-cut pads. Suppliers with proprietary resin formulations, filler-dispersion capabilities, automotive certification and stable mass-production quality are better positioned to secure high-value projects.

This report studies the global Non-Silicone Gap Filler production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-Silicone Gap Filler 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 Non-Silicone Gap Filler that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-Silicone Gap Filler total production and demand, 2021-2032, (Tons)
Global Non-Silicone Gap Filler total production value, 2021-2032, (USD Million)
Global Non-Silicone Gap Filler production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Non-Silicone Gap Filler consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Non-Silicone Gap Filler domestic production, consumption, key

domestic manufacturers and share

Global Non-Silicone Gap Filler production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Non-Silicone Gap Filler production by Product Form, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Non-Silicone Gap Filler production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Non-Silicone Gap Filler 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, Parker Hannifin Corporation, Qnity Electronics, Inc. (Laird Performance Materials), DuPont, H.B. Fuller Company, Element Solutions Inc., AOS Thermal Compounds, T-Global Technology Co., Ltd., Timtronics, KERAFOF Keramische Folien GmbH & Co. KG, 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 Non-Silicone Gap Filler 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 Product Form, 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 Non-Silicone Gap Filler Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Silicone Gap Filler Market, Segmentation by Product Form:

Gap Filler Pads

Dispensable Gap Fillers

Gap Filler Putties

Gap Filler Gels

Others

Global Non-Silicone Gap Filler Market, Segmentation by Binder Chemistry:

Polyurethane-Based

Acrylic-Based

Epoxy-Based

Silane-Modified Polymer-Based

Thermoplastic Elastomer-Based

Others

Global Non-Silicone Gap Filler Market, Segmentation by Thermal Conductivity:

Below 2 W/m²K

2-5 W/m²K

5-10 W/m²K

Above 10 W/m²K

Global Non-Silicone Gap Filler Market, Segmentation by Application:

Consumer Electronics

Automotive

Telecommunications Equipment

Optical and Imaging Equipment

Industrial Electronics

Aerospace and Defense

Medical Electronics

Others

Companies Profiled:

Henkel AG & Co. KGaA

Parker Hannifin Corporation

Qnity Electronics, Inc. (Laird Performance Materials)

DuPont

H.B. Fuller Company

Element Solutions Inc.

AOS Thermal Compounds

T-Global Technology Co., Ltd.

Timtronics

KERAFOL Keramische Folien GmbH & Co. KG

GLPOLY Thermal Management

Dongguan Ziitek Electronic Material and Technology Ltd.

Shiu Li Technology Co., Ltd. (LiPOLY)

Sanyo Chemical Industries, Ltd.

Dainichiseika Color & Chemicals Mfg. Co., Ltd.

Key Questions Answered:

1. How big is the global Non-Silicone Gap Filler market?
2. What is the demand of the global Non-Silicone Gap Filler market?
3. What is the year over year growth of the global Non-Silicone Gap Filler market?
4. What is the production and production value of the global Non-Silicone Gap Filler market?
5. Who are the key producers in the global Non-Silicone Gap Filler market?
6. What are the growth factors driving the market demand?

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