

Global One-Component Thermally Conductive Structural Adhesive Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global One-Component Thermally Conductive Structural Adhesive market size is expected to reach \$ 2190 million by 2032, rising at a market growth of 12.2% CAGR during the forecast period (2026-2032).

In 2025, global One-Component Thermally Conductive Structural Adhesive production reached approximately 12k tons, with an average global market price of around US\$80k per ton.

One-Component Thermally Conductive Structural Adhesive is a functional adhesive that combines structural bonding and thermal conduction in a pre-mixed single-component formulation. It does not require on-site mixing and can cure through moisture, heat, UV light, or other mechanisms to form a bonding layer with mechanical strength, thermal conductivity, and electrical insulation. The product is typically based on epoxy, polyurethane, silicone, MS/silane-modified polymer, or acrylic chemistry, and is filled with thermally conductive materials such as alumina, aluminum hydroxide, boron nitride, magnesium oxide, aluminum nitride, graphene, or other fillers. It bonds and fixes components while transferring heat from batteries, power modules, electronic devices, LEDs, inverters, energy storage systems, and power semiconductors to housings, heat sinks, or cooling plates. Compared with conventional structural adhesives, it places greater emphasis on thermal conductivity, bonding strength, dielectric strength, flame retardancy, humidity resistance, low volatility, low shrinkage, and long-term thermal aging stability. Compared with thermal pads or thermal greases, it also provides stronger fixation, sealing, and structural support.

The upstream supply chain of one-component thermally conductive structural adhesives

includes epoxy resins, polyurethane prepolymers, silicone polymers, MS/silane-modified resins, acrylic monomers, isocyanates, curing agents, catalysts, coupling agents, tougheners, flame retardants, plasticizers, and thermally conductive fillers such as alumina, aluminum hydroxide, boron nitride, magnesium oxide, aluminum nitride, and graphene. It also includes cartridges, drums, automated dispensing equipment, and metering/coating systems. Representative suppliers include Dow, Wacker Chemie, Momentive, Shin-Etsu Chemical, Evonik, BASF, Covestro, Huntsman, Kaneka, Arkema, 3M, Henkel, H.B. Fuller, Saint-Gobain, Denka, Showa Denko, Almatiss, Nabaltec, Nordson, and Graco. Midstream companies are adhesive formulators and manufacturers responsible for resin modification, filler hybridization, coupling treatment, rheology control, curing-system design, flame-retardant and insulation validation, and customer process support. Representative companies include Henkel, 3M, Sika, Dow, Wacker, H.B. Fuller, Huitian New Materials. Downstream applications include EV batteries, energy storage systems, electronics, telecom equipment, power modules, inverters, LED lighting, industrial control, and consumer electronics. Representative end users include Tesla, BYD, CATL, LG Energy Solution, Samsung SDI, Panasonic Energy, EVE Energy, CALB, Sunwoda, Fluence, Sungrow, Huawei, Vertiv, Delta Electronics, Apple, Samsung Electronics, Foxconn, LONGi, JinkoSolar, and Trina Solar.

The one-component thermally conductive structural adhesive market is growing rapidly, driven by rising thermal-management requirements and the upgrade of structural bonding solutions. Demand is increasing in EV batteries, energy storage systems, power electronics, telecom equipment, and high-power LEDs for integrated materials that combine bonding, thermal conduction, electrical insulation, and flame retardancy. Key trends include higher thermal conductivity, lower density, better flame retardancy, stronger dielectric insulation, lower volatility, lower stress, compatibility with automated dispensing, and improved long-term humidity and thermal-aging reliability. Growth drivers include higher battery energy density, fast-charging and high-power trends, stricter energy-storage safety requirements, electronics miniaturization, and increasing heat-dissipation pressure in power devices. Main challenges include higher viscosity and processing difficulty caused by high filler loading, high cost of premium conductive fillers, long customer qualification cycles, complex trade-offs among bonding strength, thermal conductivity, and flexibility, and strong cost-down pressure from new-energy customers. Overall, one-component thermally conductive structural adhesives represent a high-value segment at the intersection of structural adhesives and thermal-management materials, with future growth mainly driven by electric vehicles, energy storage, power electronics, and high-end electronic equipment.

This report studies the global One-Component Thermally Conductive Structural

Adhesive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for One-Component Thermally Conductive Structural 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 One-Component Thermally Conductive Structural Adhesive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global One-Component Thermally Conductive Structural Adhesive total production and demand, 2021-2032, (Kilotons)

Global One-Component Thermally Conductive Structural Adhesive total production value, 2021-2032, (USD Million)

Global One-Component Thermally Conductive Structural Adhesive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global One-Component Thermally Conductive Structural Adhesive consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: One-Component Thermally Conductive Structural Adhesive domestic production, consumption, key domestic manufacturers and share

Global One-Component Thermally Conductive Structural Adhesive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global One-Component Thermally Conductive Structural Adhesive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global One-Component Thermally Conductive Structural Adhesive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global One-Component Thermally Conductive Structural 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 Graco Inc, 3M, Henkel, Sika, Dow, Bostik, Wacker, Mapei, H.B. Fuller, Huntsman, 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 One-Component Thermally Conductive Structural Adhesive market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 One-Component Thermally Conductive Structural Adhesive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global One-Component Thermally Conductive Structural Adhesive Market,
Segmentation by Type:

Epoxy Structural Adhesive

Epoxy Structural Adhesive

Silicone Structural Adhesive

Others

Global One-Component Thermally Conductive Structural Adhesive Market,
Segmentation by Curing Method:

Moisture Curing

Heat Curing

UV Curing

Anaerobic Curing

Global One-Component Thermally Conductive Structural Adhesive Market,
Segmentation by Viscosity:

5000-50000 mPa?s

50000-200000 mPa?s

200000-800000 mPa?s

800000-2000000 mPa?s

Global One-Component Thermally Conductive Structural Adhesive Market,
Segmentation by Application:

Automotive

Aerospace

Architecture

Electronic

Others

Companies Profiled:

Graco Inc

3M

Henkel

Sika

Dow

Bostik

Wacker

Mapei

H.B. Fuller

Huntsman

Arkema

Ashland

Permabond

Master Bond

ITW Performance Polymers

Parker Hannifin

Scott Bader

Scigrip

L&L Products

Delo

Parson Adhesives

Dymax

Hernon Manufacturing

Weicon

Hoenle

Uniseal

RiedBV

Shychmat

Jiadi New Materials

Comens New Materials

Jointas Chemical

Huitian New Materials

Darbond Technology

Colltech

Baiyun Technology

Hinnel New Material

KingFuler

Key Questions Answered:

1. How big is the global One-Component Thermally Conductive Structural Adhesive market?
2. What is the demand of the global One-Component Thermally Conductive Structural Adhesive market?
3. What is the year over year growth of the global One-Component Thermally Conductive Structural Adhesive market?
4. What is the production and production value of the global One-Component Thermally Conductive Structural Adhesive market?
5. Who are the key producers in the global One-Component Thermally Conductive Structural Adhesive market?
6. What are the growth factors driving the market demand?

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