

Global PCB Thermally Conductive Adhesives Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global PCB Thermally Conductive Adhesives market size was valued at US\$ 844 million in 2025 and is forecast to a readjusted size of US\$ 1478 million by 2032 with a CAGR of 8.3% during review period.

PCB Thermally Conductive Adhesives are functional adhesive materials used in printed circuit boards and board level electronic assembly to provide both mechanical bonding and thermal conduction. These products bond components, heat sinks, metal substrates, housings or localized heat sources while creating a stable heat transfer path to reduce operating temperature. They are typically based on epoxy, silicone, acrylic or polyurethane resin systems filled with thermally conductive materials such as alumina, boron nitride, aluminum nitride, zinc oxide, graphite or metal powders. Commercial forms include liquid adhesives, paste adhesives, two part adhesives, thermal adhesive films, thermally conductive double sided tapes and preformed bonding sheets. Major applications include consumer electronics, servers, communication equipment, automotive electronics, industrial control, power modules and LED circuit boards, with major production bases concentrated in China, the United States, Germany, Japan, South Korea and Taiwan, China.

In 2025, global PCB Thermally Conductive Adhesives production reached approximately 48,000 to 56,000 tons, measured on a finished adhesive weight basis after converting liquid adhesives, paste adhesives, films, tapes and preformed bonding sheets into a comparable volume unit. The mainstream global FOB price ranged from approximately USD 13.5 to USD 17.5 per kg; standard thermal epoxy adhesives and thermally conductive double sided tapes were generally priced at the lower end, while

high thermal conductivity, low ionic contamination, flame retardant, automotive qualified and server power supply grade products carried a clear premium.

The growth opportunity for PCB Thermally Conductive Adhesives is being driven by higher power density in electronic devices and the shift of board level thermal management from a supporting design factor to a core reliability requirement. AI servers, high speed switches, automotive controllers, power supplies, LED lighting and miniaturized consumer electronics are increasing localized heat flux on PCBs, creating stronger demand for heat sink bonding, power component attachment, metal substrate bonding and thermally conductive structural adhesion. Compared with mechanical fasteners, thermally conductive adhesives can combine bonding, heat dissipation, gap filling, vibration damping and lightweighting functions, while also improving automated assembly efficiency and reducing space occupied by screws, clips and insulating pads. As automotive electronics and server power systems impose stricter requirements on long term reliability, flame retardancy, electrical insulation and low volatility, the value share of high end thermally conductive silicone adhesives, epoxy adhesives and adhesive films is expected to keep rising.

Key market challenges lie in formulation balance and customer qualification cycles. Higher thermal conductivity usually requires heavier filler loading, but high filler content can increase viscosity, reduce dispensing performance, raise bond line stress and affect adhesion stability. For precision PCBs and high frequency high speed circuits, low ionic contamination, low outgassing, dielectric performance and thermal cycling stability further raise the technical threshold. On the demand side, consumer electronics will continue to emphasize thin form factors, automated placement and cost control; automotive electronics and industrial control will focus more on temperature resistance, damp heat resistance and long term reliability; servers and communication equipment will prioritize high thermal conductivity, low thermal resistance and serviceability. Future competition will increasingly shift from price based competition to integrated competition in formulation performance, process compatibility, customer qualification and stable supply.

This report is a detailed and comprehensive analysis for global PCB Thermally Conductive Adhesives market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global PCB Thermally Conductive Adhesives market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PCB Thermally Conductive Adhesives market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PCB Thermally Conductive Adhesives market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global PCB Thermally Conductive Adhesives market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for PCB Thermally Conductive Adhesives

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global PCB Thermally Conductive Adhesives market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Henkel AG & Co. KGaA, 3M Company, Dow Inc., Parker Hannifin Corporation, DuPont de Nemours, Inc., KCC Corporation, Wacker Chemie AG, Element Solutions Inc., tesa SE, CHT Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

PCB Thermally Conductive Adhesives market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Silicone Based Adhesives

Epoxy Based Adhesives

Acrylic Based Adhesives

Others

Market segment by Electrical Property

Electrically Insulating Adhesives

Electrically Conductive Adhesives

Others

Market segment by Downstream Industry

Consumer Electronics

Automotive Electronics

Communication Equipment

Others

Market segment by Component System

One Part Adhesives

Two Part Adhesives

Preformed Adhesive Materials

Market segment by Application

Heat Sink Bonding

Component to PCB Bonding

LED Board Thermal Bonding

Others

Major players covered

Henkel AG & Co. KGaA

3M Company

Dow Inc.

Parker Hannifin Corporation

DuPont de Nemours, Inc.

KCC Corporation

Wacker Chemie AG

Element Solutions Inc.

tesa SE

CHT Group

Hoenle Adhesives GmbH

DELO Industrial Adhesives GmbH & Co. KGaA

Master Bond Inc.

Shin-Etsu Chemical Co., Ltd.

Nitto Denko Corporation

Cemedine Co., Ltd.

Nagase ChemteX Corporation

T-Global Technology Co., Ltd.

Kohesi Bond

Shenzhen FRD Science & Technology Co., Ltd.

Suzhou Tianmai Thermal Technology Co., Ltd.

Hubei Huitian New Materials Co., Ltd.

Guangzhou Joints Chemical Co., Ltd.

Shenzhen Aochuan Technology Co., Ltd.

Dongguan Ziitek Electronical Material and Technology Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PCB Thermally Conductive Adhesives product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PCB Thermally Conductive Adhesives, with price, sales quantity, revenue, and global market share of PCB Thermally Conductive Adhesives from 2021 to 2026.

Chapter 3, the PCB Thermally Conductive Adhesives competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PCB Thermally Conductive Adhesives breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and PCB Thermally Conductive Adhesives market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of PCB Thermally Conductive Adhesives.

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