

Global PCB Thermally Conductive Adhesives Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PCB Thermally Conductive Adhesives market size is expected to reach \$ 1478 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

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 studies the global PCB Thermally Conductive Adhesives production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PCB Thermally Conductive Adhesives 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 PCB Thermally Conductive Adhesives that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PCB Thermally Conductive Adhesives total production and demand, 2021-2032, (Tons)

Global PCB Thermally Conductive Adhesives total production value, 2021-2032, (USD Million)

Global PCB Thermally Conductive Adhesives production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global PCB Thermally Conductive Adhesives consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: PCB Thermally Conductive Adhesives domestic production, consumption, key domestic manufacturers and share

Global PCB Thermally Conductive Adhesives production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global PCB Thermally Conductive Adhesives production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global PCB Thermally Conductive Adhesives production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global PCB Thermally Conductive Adhesives 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PCB Thermally Conductive Adhesives 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 PCB Thermally Conductive Adhesives Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PCB Thermally Conductive Adhesives Market, Segmentation by Type:

Silicone Based Adhesives

Epoxy Based Adhesives

Acrylic Based Adhesives

Others

Global PCB Thermally Conductive Adhesives Market, Segmentation by Electrical Property:

Electrically Insulating Adhesives

Electrically Conductive Adhesives

Others

Global PCB Thermally Conductive Adhesives Market, Segmentation by Downstream Industry:

Consumer Electronics

Automotive Electronics

Communication Equipment

Others

Global PCB Thermally Conductive Adhesives Market, Segmentation by Component System:

One Part Adhesives

Two Part Adhesives

Preformed Adhesive Materials

Global PCB Thermally Conductive Adhesives Market, Segmentation by Application:

Heat Sink Bonding

Component to PCB Bonding

LED Board Thermal Bonding

Others

Companies Profiled:

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 Jointas Chemical Co., Ltd.

Shenzhen Aochuan Technology Co., Ltd.

Dongguan Ziitek Electronical Material and Technology Ltd.

Key Questions Answered:

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

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