

Global Silicone-free Thermal Pad Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Silicone-free Thermal Pad market size is expected to reach \$ 1379 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

Silicone-free thermal pad refers to a thermal interface gasket that is not based on silicone rubber or silicone oil system. It is usually made of acrylic acid, polyurethane, epoxy, special resin, carbon based material or other non silicon polymers as the matrix, and filled with thermal conductive fillers such as alumina, boron nitride, aluminum nitride, graphite, carbon fiber, carbon nanotubes, etc. Its main function is to fill the air gap between chips, power devices, optical modules, power modules, battery management systems, heat sinks, and metal shells, reduce contact thermal resistance, and improve heat dissipation efficiency. Compared to ordinary silicone thermal pads, the core advantages of silicon free thermal pads are low volatility, no silicone oil precipitation, low silicone pollution, and more friendly to electrical contacts and optical devices. They are suitable for applications such as optical electronics, hard drives, camera modules, sensors, automotive electronics, communication equipment, servers, aerospace, and high reliability electronic devices that are sensitive to silicon pollution. In 2025, global Silicone-free Thermal Pad production reached approximately 20.96 M Sq m, with an average global market price of around US\$ 44.20 per Sq m.

Silicone-free thermal pad are a rapidly growing high reliability sub category in thermal interface materials. The market demand mainly comes from automotive electronics, 5G communication equipment, optical modules, AI servers, data centers, power modules, industrial control, hard disk storage, camera modules, lasers, and high-end sensors. Among them, automotive electronics and optical communication have high requirements for low silicone volatilization, low oil output, and long-term reliability, which is the main driving force for silicon free thermal conductive gaskets to replace traditional

silicone gaskets. In terms of product structure, acrylic and polyurethane based silicon free thermal pads are the main sources of sales, while ceramic filled types have both insulation and thermal conductivity, making them the mainstream. Carbon based and ultra-high thermal conductivity products have higher unit prices and are mainly used in AI servers, power semiconductors, aerospace electronics, and high heat flux density devices. The future market opportunities mainly focus on high thermal conductivity and low hardness silicon free gaskets, low volatility optical grade thermal conductive gaskets, automotive grade silicon free thermal conductive gaskets, AI server high heat flux density heat dissipation gaskets, power semiconductor insulation thermal conductive gaskets, as well as automated adhesive and roll type silicon free thermal conductive gaskets.

This report studies the global Silicone-free Thermal Pad production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Silicone-free Thermal Pad total production and demand, 2021-2032, (K Sqm)

Global Silicone-free Thermal Pad total production value, 2021-2032, (USD Million)

Global Silicone-free Thermal Pad production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm), (based on production site)

Global Silicone-free Thermal Pad consumption by region & country, CAGR, 2021-2032 & (K Sqm)

U.S. VS China: Silicone-free Thermal Pad domestic production, consumption, key domestic manufacturers and share

Global Silicone-free Thermal Pad production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sqm)

Global Silicone-free Thermal Pad production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

Global Silicone-free Thermal Pad production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sqm)

This report profiles key players in the global Silicone-free Thermal Pad 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 Corporation, Qnity Electronics, Parker Hannifin, 3M, Fujipoly, Kitagawa Industries, Kerafol Keramische Folien, T-Global, Shiu Li Tech, dB & DEGREES, 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 Silicone-free Thermal Pad market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sqm) and average price (US\$/Sq m) 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 Silicone-free Thermal Pad Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Silicone-free Thermal Pad Market, Segmentation by Type:

Acrylic Based

Polyurethane-Based

Other

Global Silicone-free Thermal Pad Market, Segmentation by Thermal Conductivity:

Thermal Conductivity10w/M?K

Global Silicone-free Thermal Pad Market, Segmentation by Thickness:

Thickness5mm

Global Silicone-free Thermal Pad Market, Segmentation by Application:

Medical Equipment

Automotive Electronics

Communication And Network

Industrial Automation

Other

Companies Profiled:

Henkel Corporation

Qnity Electronics

Parker Hannifin

3M

Fujipoly

Kitagawa Industries

Kerafol Keramische Folien

T-Global

Shiu Li Tech

dB & DEGREES

NEDC Sealing Solutions

Shenzhen AOCHUAN Technology

Shenzhen Goldlink Tongda Electronics

Dongguan Sheen Electronic Technology

Shenzhen Vital New Material

Suzhou Hemi Electronics

SinoGuide

Shenzhen Liquan Lianfa Technology

Key Questions Answered:

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

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