

Global Thermal Graphite Films for Robotics 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 Thermal Graphite Films for Robotics market size was valued at US\$ 49.39 million in 2025 and is forecast to a readjusted size of US\$ 217 million by 2032 with a CAGR of 22.9% during review period.

Robot thermal graphite film is a high thermal conductivity heat management material designed for industrial robots, collaborative robots, humanoid robots, mobile robots, and intelligent robotic control systems, mainly used for heat spreading and thermal balancing in robot controllers, servo drives, AI computing modules, machine vision systems, battery management units, and robotic joint actuators. Its core attributes include high in plane thermal conductivity, lightweight structure, flexibility, and ultra thin characteristics. The research scope mainly covers synthetic graphite film, PI graphite film, composite thermal graphite film, and ultra thin graphite sheets. Major product forms include single layer graphite film, multilayer composite graphite film, adhesive backed graphite film, and die cut thermal graphite sheets. Core manufacturing technologies involve polyimide carbonization and graphitization, high temperature heat treatment, calendaring, coating and lamination, precision die cutting, and thermal structure engineering. Key specifications include in plane thermal conductivity, thickness, thermal diffusion efficiency, flexural durability, heat resistance, and dielectric performance. The products are mainly used to improve heat dissipation efficiency, reduce local heat accumulation, stabilize high power modules, and optimize lightweight thermal management in robotic systems, especially in robot controllers, machine vision modules, humanoid robots, and edge AI computing systems. In 2025, the global robot thermal graphite film industry recorded an average gross margin of approximately 28 percent to 45 percent, while the average selling price ranged from around 12 US dollars to 45 US dollars per square meter.

The robot thermal graphite film industry is evolving from a consumer electronics thermal management segment into an emerging robotics heat management market driven by increasing power density, edge AI computing demand, and lightweight robotic architectures. As industrial robots, collaborative robots, humanoid robots, and machine vision systems require higher processing capability and multi sensor integration, conventional metallic heat dissipation structures are gradually being replaced by lightweight, flexible, and high thermal conductivity materials. The upstream supply chain mainly consists of polyimide films, needle coke, graphitization equipment, high temperature processing materials, and coating materials, while the midstream focuses on synthetic graphite film manufacturing and composite thermal material processing. Downstream applications include robot controllers, servo systems, machine vision modules, edge AI computing units, and high power robotic joints. Technical barriers are increasingly concentrated in ultra high thermal conductivity control, ultra thin processing capability, graphitization process stability, flexural durability, and complex thermal interface integration. The high end market remains dominated by Japanese and Western suppliers, while Chinese manufacturers are rapidly expanding from consumer electronics thermal films into robotics thermal management applications.

Global supply chains are gradually shifting from consumer electronics thermal materials toward intelligent robotic heat management solutions, leading to changes in regional competitive dynamics. Japanese suppliers continue to maintain strong positions in ultra thin graphite sheets, synthetic graphite films, and high reliability heat spreading materials, while North American companies retain advantages in high performance graphite materials and advanced thermal management solutions. China has emerged as one of the fastest growing markets due to rapid expansion of domestic robotics manufacturing, humanoid robot commercialization, intelligent manufacturing upgrades, and growing AI hardware demand. Recent years have witnessed substantial investment in production expansion, graphitization capacity upgrades, and advanced thermal material processing lines. At the same time, technologies originally developed for smartphones, tablets, and high performance electronics are increasingly being adapted for robot controllers, machine vision systems, and high power robotic joints to support lightweight heat dissipation and higher thermal load management requirements.

Over the next several years, the robot thermal graphite film market is expected to grow faster than the broader thermal management materials sector as humanoid robotics, edge AI computing, machine vision, and high power servo systems continue to expand. Increasing integration density and rising localized heat generation within robotic systems are expected to significantly increase demand for advanced heat spreading

materials. Regional supply chain restructuring, localization trends, and intelligent manufacturing policies are also accelerating the development of local thermal material production capacity. Competitive dynamics are gradually shifting from traditional thermal material manufacturing toward advanced thermal structure engineering, multilayer composite solutions, ultra thin processing capability, and customized die cutting technologies. Companies with strengths in graphitization processing, precision manufacturing, and advanced thermal material platforms are expected to secure stronger competitive positions during the next phase of robotic industry upgrades.

This report is a detailed and comprehensive analysis for global Thermal Graphite Films for Robotics 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 Thermal Graphite Films for Robotics market size and forecasts, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Thermal Graphite Films for Robotics market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Thermal Graphite Films for Robotics market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Sq m), and average selling prices (US\$/Sq m), 2021-2032

Global Thermal Graphite Films for Robotics market shares of main players, shipments in revenue (\$ Million), sales quantity (Sq m), and ASP (US\$/Sq m), 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 Thermal Graphite Films for Robotics

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 Thermal Graphite Films for Robotics 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 Panasonic Holdings Corporation, NeoGraf Solutions, LLC, Kaneka Corporation, Toyo Tanso Co., Ltd., GrafTech International Ltd., Shenzhen SED New Material Co., Ltd., Suzhou Tianmai Thermal Technology Co., Ltd., T-Global Technology Co., Ltd., Dexerials Corporation, Denka Company Limited, etc.

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

Market Segmentation

Thermal Graphite Films for Robotics 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

Synthetic Graphite Film

PI Graphite Film

Composite Graphite Film

Adhesive-backed Graphite Film

Die-cut Thermal Graphite Sheet

Others

Market segment by Manufacturing Process

PI Carbonization Process

Graphitization Process

Calendering Process

Lamination Process

Die-cutting Process

Coating Process

Others

Market segment by Thermal Conductivity

Below 500 W/m²K

500-1000 W/m²K

1000-1500 W/m²K

Above 1500 W/m²K

Others

Market segment by Thickness Range

Below 25 μ m

25-50 μ m

50-100 μ m

Above 100 ?m

Others

Market segment by Application

Robot Controllers

Servo Drive Systems

Machine Vision Modules

Robotic Joint Modules

Battery Management Systems

Edge AI Computing Units

Others

Major players covered

Panasonic Holdings Corporation

NeoGraf Solutions, LLC

Kaneka Corporation

Toyo Tanso Co., Ltd.

GrafTech International Ltd.

Shenzhen SED New Material Co., Ltd.

Suzhou Tianmai Thermal Technology Co., Ltd.

T-Global Technology Co., Ltd.

Dexerials Corporation

Denka Company Limited

Boyd Corporation

SGL Carbon SE

Mersen Group

SKC Co., 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 Thermal Graphite Films for Robotics product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Thermal Graphite Films for Robotics, with price, sales quantity, revenue, and global market share of Thermal Graphite Films for Robotics from 2021 to 2026.

Chapter 3, the Thermal Graphite Films for Robotics competitive situation, sales quantity,

revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Thermal Graphite Films for Robotics 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 Thermal Graphite Films for Robotics 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 Thermal Graphite Films for Robotics.

Chapter 14 and 15, to describe Thermal Graphite Films for Robotics sales channel, distributors, customers, research findings and conclusion.

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