

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

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Abstracts

The global Thermally Conductive Electronic Adhesives market size is expected to reach \$ 486 million by 2032, rising at a market growth of 9.8% CAGR during the forecast period (2026-2032).

Thermally Conductive Electronic Adhesives are functional adhesive materials used in electronic components, power modules, printed circuit board assemblies, heat sinks, battery modules, LEDs, sensors, communication equipment and industrial electronics systems, combining bonding, interface filling and heat transfer functions. They are typically based on epoxy, silicone, polyurethane, acrylic or modified resin systems and filled with alumina, boron nitride, aluminum nitride, zinc oxide, graphite or other thermally conductive fillers. These products form stable bond lines through one-component, two-component, heat-curing, room-temperature-curing, moisture-curing, light-curing or pressure-sensitive bonding mechanisms, helping reduce thermal resistance between heat-generating devices and heat-dissipation structures while replacing part of the need for mechanical fasteners, general adhesives or non-adhesive thermal interface materials.

Thermally Conductive Electronic Adhesives are mainly used in electric vehicle battery packs and electronic control systems, automotive electronics, power electronics, servers and communication equipment, power modules, consumer electronics, LED lighting, industrial control and medical electronics. Major production regions include the United States, Germany, Japan, South Korea, China, Taiwan, Switzerland, Norway, Singapore and India. European, U.S., Japanese and South Korean suppliers maintain stronger positions in high-reliability thermally conductive epoxy adhesives, silicone adhesives, automotive-grade materials and power electronics applications, while Chinese suppliers are expanding in electric vehicles, solar and energy storage, power

supplies, LED and general electronics thermal bonding applications.

In 2025, global Thermally Conductive Electronic Adhesives production reached approximately 10.5-12.5 thousand tons. The average FOB price was approximately USD 19.5-22.5 per kg, with general-purpose thermally conductive epoxy adhesives and LED thermal bonding adhesives priced below the market average, while automotive-grade thermally conductive silicone adhesives, high-conductivity low-stress adhesives, power electronics adhesives and high-reliability thermally conductive adhesive films commanded higher prices.

The global Thermally Conductive Electronic Adhesives market is benefiting from higher power density in electronics, vehicle electrification, data center expansion and industrial power supply upgrades. As chips, power devices, battery modules, LED light sources, communication modules and power systems generate more heat, customers are placing greater emphasis on heat dissipation efficiency, bonding reliability, lightweight design and automated assembly. Thermally conductive electronic adhesives are no longer merely substitutes for general adhesives; they are increasingly part of thermal management structure design. Their advantages in reducing mechanical fasteners, lowering interface thermal resistance, improving vibration resistance and supporting automated dispensing are becoming more important. Electric vehicle battery packs, electric drive controllers, on-board chargers, server power supplies, photovoltaic inverters, energy storage converters and high-brightness LEDs remain the main growth applications.

Key market challenges come from performance trade-offs, qualification cycles and raw material cost volatility. Thermally conductive electronic adhesives must combine high thermal conductivity, strong adhesion, low stress, damp heat resistance, thermal shock resistance, electrical insulation, flame retardancy and processability. However, higher filler loading often increases viscosity, complicates dispensing, reduces interface wetting and raises brittleness risk. Automotive electronics, power electronics and high-end communication equipment customers require long validation cycles, and new materials must pass extended reliability testing and process adaptation before entering core supply chains. At the same time, price fluctuations in alumina, boron nitride, aluminum nitride, epoxy resins, silicone intermediates, isocyanates and functional additives can affect supplier margins. Future competition will focus more on high-conductivity low-modulus formulations, automotive-grade qualification, low-volatility and low-ionic control, automated dispensing compatibility, regional supply capability and joint development with customer thermal design processes.

This report studies the global Thermally Conductive Electronic Adhesives production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Thermally Conductive Electronic 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 (Parker LORD), KCC Corporation (Momentive Performance Materials), Shin-Etsu Chemical Co., Ltd., Wacker Chemie AG, Arkema S.A. (Bostik and Polytec PT), DELO Industrial Adhesives GmbH & Co. KGaA, Hoenle AG (Hoenle Adhesives), 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 Thermally Conductive Electronic 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 Thermally Conductive Electronic Adhesives Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermally Conductive Electronic Adhesives Market, Segmentation by Type:

Epoxy Thermally Conductive Adhesives

Silicone Thermally Conductive Adhesives

Acrylic Thermally Conductive Adhesives

Others

Global Thermally Conductive Electronic Adhesives Market, Segmentation by Physical Form:

Liquid Adhesives

Paste Adhesives

Adhesive Tapes

Adhesive Films

Global Thermally Conductive Electronic Adhesives Market, Segmentation by Adhesive Format:

Two Component Adhesives

One Component Adhesives

Pressure Sensitive Adhesive Products

Others

Global Thermally Conductive Electronic Adhesives Market, Segmentation by Cure Mechanism:

Heat Cure Adhesives

Room Temperature Cure Adhesives

Pressure Sensitive Adhesives

Others

Global Thermally Conductive Electronic Adhesives Market, Segmentation by Application:

Automotive and Electric Vehicle Electronics

Industrial Electronics and Power Electronics

Consumer Electronics

Others

Companies Profiled:

Henkel AG & Co. KGaA

3M Company

Dow Inc.

Parker Hannifin Corporation (Parker LORD)

KCC Corporation (Momentive Performance Materials)

Shin-Etsu Chemical Co., Ltd.

Wacker Chemie AG

Arkema S.A. (Bostik and Polytec PT)

DELO Industrial Adhesives GmbH & Co. KGaA

Hoenle AG (Hoenle Adhesives)

Master Bond Inc.

MG Chemicals

Nagase ChemteX Corporation

NAMICS Corporation

Nitto Denko Corporation

Sekisui Chemical Co., Ltd.

ThreeBond Holdings Co., Ltd.

Everwide Chemical Company

Kohesi Bond

Vitrochem Technology Pte Ltd

Hubei Huitian New Materials Co., Ltd.

Shanghai Beginor Polymer Material Co., Ltd.

Hangzhou Zhijiang Silicone Chemicals Co., Ltd.

Shanghai Kangda New Materials Group Co., Ltd.

Zhejiang Sunliky New Material Technology Co., Ltd.

Key Questions Answered:

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

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