

Global Thermally Conductive Phase Change Materials Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermally Conductive Phase Change Materials market size is expected to reach \$ 2965 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Thermally Conductive Phase Change Materials (PCMs) are thermal interface materials manufactured by incorporating thermally conductive fillers such as aluminum oxide, boron nitride, and graphite into polymer, wax-based, or non-silicone resin matrices. Common product forms include sheets, films, pastes, and printable coating materials. These materials remain solid or semi-solid at room temperature but soften when reaching a phase transition temperature typically between 40°C and 80°C, allowing them to wet and fill microscopic gaps between chips, power devices, and heat sinks. This mechanism reduces interfacial thermal resistance while minimizing pump-out and dry-out risks. Thermally conductive PCMs are widely used in CPU/GPU cooling, servers, communication equipment, automotive electronics, and power modules. The overall gross margin is approximately 48%.

Demand for thermally conductive phase change materials is primarily driven by increasing power density and higher thermal interface stability requirements in electronic devices. Servers, automotive electronics, communication equipment, consumer electronics, and power modules continue to evolve toward higher power levels, greater miniaturization, and increased integration. As a result, lower thermal resistance and more reliable interface materials are required between chips, heat sinks, vapor chambers, and metal housings, accelerating the adoption of phase change sheets, phase change films, and pre-applied phase change materials.

Compared with thermal grease, thermally conductive phase change materials soften

under operating temperatures and effectively fill interfacial gaps, while maintaining a relatively stable form after cooling. This helps reduce pump-out, dry-out, and coating non-uniformity issues, making them particularly suitable for high-volume assembly and long-term operation. Thermal management upgrades in AI servers, electric vehicle powertrains, automotive controllers, RF devices in communication base stations, and premium electronic devices are expected to continue driving demand for products with higher thermal conductivity, lower volatility, reduced oil bleed, and superior thermal cycling resistance.

Industry competition is determined not only by thermal conductivity performance but also by phase transition temperature control, thickness tolerance, interfacial wettability, electrical insulation reliability, and customer qualification capabilities. International suppliers maintain strong first-mover advantages in high-end electronics and automotive applications. However, domestic manufacturers still have significant opportunities for import substitution and expansion into mid- to high-end markets if they can improve formulation stability, precision coating technologies, die-cutting capabilities, and successfully enter the qualification systems of major customers.

This report studies the global Thermally Conductive Phase Change Materials production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Thermally Conductive Phase Change Materials total production and demand, 2021-2032, (kg)

Global Thermally Conductive Phase Change Materials total production value, 2021-2032, (USD Million)

Global Thermally Conductive Phase Change Materials production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Thermally Conductive Phase Change Materials consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Thermally Conductive Phase Change Materials domestic production, consumption, key domestic manufacturers and share

Global Thermally Conductive Phase Change Materials production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Thermally Conductive Phase Change Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Thermally Conductive Phase Change Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Thermally Conductive Phase Change Materials 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, Honeywell, Parker Hannifin, Laird, Momentive, 3M, Wakefield Thermal, AI Technology, Shanghai Allied, Suzhou Techinno, 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 Phase Change Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 Phase Change Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermally Conductive Phase Change Materials Market, Segmentation by Type:

Phase Change Pads and Films

Phase Change Rolls and Sheets

Phase Change Pastes and Compounds

Pre-Applied Phase Change Materials

Die-Cut Phase Change Parts

Global Thermally Conductive Phase Change Materials Market, Segmentation by Thermal Conductivity:

Below 3 W/m²K

3 to 6 W/m²K

6 to 10 W/m²K

Above 10 W/m²K

Global Thermally Conductive Phase Change Materials Market, Segmentation by Phase Change Temperature:

Below 45°C

45 to 55°C

55 to 65°C

Above 65°C

Global Thermally Conductive Phase Change Materials Market, Segmentation by Matrix Chemistry:

Silicone-Based

Silicone-Free Polymer

Wax-Based Composite

Graphite or Carbon Hybrid

Other Matrix

Global Thermally Conductive Phase Change Materials Market, Segmentation by Application:

Computing and Data Centers

Consumer Electronics

Telecom and Networking

Automotive Electronics

Power Electronics and Industrial

Medical and Aerospace

Companies Profiled:

Henkel

Honeywell

Parker Hannifin

Laird

Momentive

3M

Wakefield Thermal

AI Technology

Shanghai Allied

Suzhou Techinno

Key Questions Answered:

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

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