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Global Ultra-Soft Thermal Conductivity Silicone Sheet Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Ultra-Soft Thermal Conductivity Silicone Sheet market size is expected to reach $ 292 million by 2032, rising at a market growth of 11.9% CAGR during the forecast period (2026-2032).

Ultra-soft thermally conductive silicone sheets are flexible thermal interface materials (TIMs) featuring a continuous matrix of silicone rubber or silicone gel elastomer filled with thermally conductive, electrically insulating fillers such as aluminum oxide, zinc oxide, and boron nitride. Supplied as pre-cured sheets, Gap Pads, or die-cut parts, they are characterized by ultra-low hardness, low modulus, low compressive stress, high compressibility, and excellent surface conformability. These properties allow them to fill significant dimensional tolerances and microscopic voids between components (such as chips, PCBs, and power devices) and heat sinks, metal housings, or cold plates under minimal assembly pressure, thereby reducing actual interfacial thermal resistance and preventing mechanical damage to GPUs, CPUs, ASICs, optical modules, power devices, and thin PCBs. Key applications include GPUs, CPUs, ASICs, HBM surroundings, and power modules in AI servers and high-performance computing equipment; 800G/1.6T optical modules, switches, and high-speed networking gear; 5G and telecommunications infrastructure; BMS, OBC, DC/DC converters, inverters, ADAS, and domain controllers in new energy vehicles; as well as energy storage PCS, industrial power supplies, LEDs, consumer electronics, robotics, medical equipment, and aerospace and defense electronics.

The upstream supply chain primarily comprises liquid silicone rubber or silicone gel matrices; thermally conductive fillers such as aluminum oxide, zinc oxide, and boron nitride; and auxiliary materials including coupling agents, surface treatment agents, flame retardants, curing agents, fiberglass mesh, PET or other reinforcing carriers, and

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release films. The midstream sector involves the development of highly filled thermal formulations, filler surface modification and multi-particle-size grading, compounding and dispersion, vacuum degassing, calendering or coating, curing, fiberglass lamination, control of surface tack and oil bleed, precision thickness control, and die-cutting, as well as testing for thermal resistance, compressive stress, insulation, and long-term aging. The downstream sector connects heat dissipation modules, die-cut TIM components, EMS providers, and end-device supply chains to customers in data centers, telecommunications, automotive, energy storage, industrial electronics, and consumer electronics. Manufacturers typically achieve gross margins of approximately 30%–45%. Regionally, Asia-Pacific remains the largest market, benefiting from concentrated electronics manufacturing, TIM material processing, and new energy vehicle supply chains across China, Japan, South Korea, and Taiwan. North America has emerged as a high-value, fast-growing market driven by investments in AI servers and hyperscale data centers. Demand in Europe is concentrated primarily in automotive electronics, industrial power electronics, telecommunications, and high-reliability equipment. Future industry technology roadmaps will shift from a focus on mere softness toward competition based on a comprehensive performance profile: ultra-softness, high thermal conductivity, low actual thermal resistance, low oil bleed, high insulation, and high reliability. On one hand, material modulus will be reduced and thermal conductivity further increased—facilitating the expanded application of ultra-low modulus products exceeding 10 W/(m·K)—through optimized silicone networks, graded spherical ceramic fillers, and high-conductivity fillers like boron nitride (BN). On the other hand, the increasing sensitivity of AI chips, optical modules, and thin PCBs to compressive stress will drive growth in products characterized by Shore 00 low hardness, gel-like softness, and low contact pressure; simultaneously, the requirements for sufficient tear resistance and ease of handling in server, automotive, and industrial assembly applications are making the "ultra-soft material + fiberglass reinforcement layer" configuration a key development direction.

Report Scope

This report studies the global Ultra-Soft Thermal Conductivity Silicone Sheet production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Ultra-Soft Thermal Conductivity Silicone Sheet 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 Ultra-Soft

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Thermal Conductivity Silicone Sheet that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Ultra-Soft Thermal Conductivity Silicone Sheet total production and demand, 2021-2032, (Tons)

Global Ultra-Soft Thermal Conductivity Silicone Sheet total production value, 2021-2032, (USD Million)

Global Ultra-Soft Thermal Conductivity Silicone Sheet production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Ultra-Soft Thermal Conductivity Silicone Sheet consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Ultra-Soft Thermal Conductivity Silicone Sheet domestic production, consumption, key domestic manufacturers and share

Global Ultra-Soft Thermal Conductivity Silicone Sheet production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Ultra-Soft Thermal Conductivity Silicone Sheet production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Ultra-Soft Thermal Conductivity Silicone Sheet production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Ultra-Soft Thermal Conductivity Silicone Sheet 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 Adhesive Technologies, Laird, Parker Hannifin, 3M, Fujipoly America, Shin-Etsu Chemical, Sekisui Chemical, Taica, Keramische Folien, Shenzhen FRD Science & Technology,

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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 Ultra-Soft Thermal Conductivity Silicone Sheet market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) 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 Ultra-Soft Thermal Conductivity Silicone Sheet Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Ultra-Soft Thermal Conductivity Silicone Sheet Market, Segmentation by Type:

Low-to-Medium Thermal Conductivity: <3 W/(m·K)

Medium-to-High Thermal Conductivity: 3–6 W/(m·K)

High Thermal Conductivity/Ultra-Soft: >6 W/(m·K)

Global Ultra-Soft Thermal Conductivity Silicone Sheet Market, Segmentation by Structure:

Single-Layer Silicone Sheet

Fiberglass-Reinforced Composite Sheet

Laminated Composite Sheet

Global Ultra-Soft Thermal Conductivity Silicone Sheet Market, Segmentation by Application:

AI Servers

Communication Equipment

New Energy Vehicles

Industrial Electronics

Defense & Aerospace

Others

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Companies Profiled:

Henkel Adhesive Technologies

Laird

Parker Hannifin

3M

Fujipoly America

Shin-Etsu Chemical

Sekisui Chemical

Taica

Keramische Folien

Shenzhen FRD Science & Technology

Shenzhen Aochuan Technology

Ziitek

Shenzhen Goldlink Tongda Electronics

Guangdong Kingbali New Material

Dongguan Sheen Electronic Technology

HUIWELL Thermal Management Technology (Dongguan

Shenzhen Youhede Electronics

T-Global Technology

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Key Questions Answered

1. How big is the global Ultra-Soft Thermal Conductivity Silicone Sheet market?
2. What is the demand of the global Ultra-Soft Thermal Conductivity Silicone Sheet market?
3. What is the year over year growth of the global Ultra-Soft Thermal Conductivity Silicone Sheet market?
4. What is the total value of the global Ultra-Soft Thermal Conductivity Silicone Sheet market?
5. Who are the Major Players in the global Ultra-Soft Thermal Conductivity Silicone Sheet market?
6. What are the growth factors driving the market demand?

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