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Global Ultra-Soft Thermal Conductivity Silicone Sheet 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 Ultra-Soft Thermal Conductivity Silicone Sheet market size was valued at US$ 136 million in 2025 and is forecast to a readjusted size of US$ 292 million by 2032 with a CAGR of 11.9% during review period.

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

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nitride; and auxiliary materials including coupling agents, surface treatment agents, flame retardants, curing agents, fiberglass mesh, PET or other reinforcing carriers, and 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 is a detailed and comprehensive analysis for global Ultra-Soft Thermal Conductivity Silicone Sheet 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

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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 Ultra-Soft Thermal Conductivity Silicone Sheet market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Ultra-Soft Thermal Conductivity Silicone Sheet market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Ultra-Soft Thermal Conductivity Silicone Sheet market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global Ultra-Soft Thermal Conductivity Silicone Sheet market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/kg), 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 Ultra-Soft Thermal Conductivity Silicone Sheet

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 Ultra-Soft Thermal Conductivity Silicone Sheet 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 Henkel Adhesive Technologies, Laird, Parker Hannifin, 3M, Fujipoly America, Shin-Etsu Chemical,

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Sekisui Chemical, Taica, Keramische Folien, Shenzhen FRD Science & Technology, etc.

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

Ultra-Soft Thermal Conductivity Silicone Sheet 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 Segmentation

Market segment 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)

Market segment by Structure

Single-Layer Silicone Sheet

Fiberglass-Reinforced Composite Sheet

Laminated Composite Sheet

Market segment by Application

AI Servers

Communication Equipment

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New Energy Vehicles

Industrial Electronics

Defense & Aerospace

Others

Major players covered

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

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Dongguan Sheen Electronic Technology

HUIWELL Thermal Management Technology (Dongguan

Shenzhen Youhede Electronics

T-Global Technology

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)

Chapter Outline

Chapter 1, to describe Ultra-Soft Thermal Conductivity Silicone Sheet product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Ultra-Soft Thermal Conductivity Silicone Sheet, with price, sales quantity, revenue, and global market share of Ultra-Soft Thermal Conductivity Silicone Sheet from 2021 to 2026.

Chapter 3, the Ultra-Soft Thermal Conductivity Silicone Sheet competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Ultra-Soft Thermal Conductivity Silicone Sheet breakdown data are

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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 Ultra-Soft Thermal Conductivity Silicone Sheet 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 Ultra-Soft Thermal Conductivity Silicone Sheet.

Chapter 14 and 15, to describe Ultra-Soft Thermal Conductivity Silicone Sheet sales channel, distributors, customers, research findings and conclusion.

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