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Electrically Conductive Adhesives Market Report by Type (Isotropic Conductive Adhesives, Anisotropic Conductive Adhesives), Chemistry (Epoxy, Silicone, Acrylic, Polyurethane, and Others), Filler Material (Silver Fillers, Carbon Fillers, Copper Fillers, and Others), Application (Automotive, Consumer Electronics, Aerospace, Biosciences, and Others), and Region 2024-2032

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Abstracts

The global electrically conductive adhesives market size reached US$ 2.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US$ 3.8 Billion by 2032, exhibiting a growth rate (CAGR) of 4.3% during 2024-2032. Rising miniaturization trends in electronics, ongoing advancements in material science, the surging adoption in automotive electronics, and the growing demand for adhesives in medical devices are primarily driving the industry's growth.

Electrically Conductive Adhesives Market Analysis:

Major Market Drivers: Significant growth in the electronics industry across the globe is one of the key factors creating a positive outlook for the market. Moreover, the increasing demand for single-part and two-part epoxy adhesives in power electronics coupled with the launch of miniaturized electronic devices with light, thin and small-sized components is providing a thrust to the market growth.

Key Market Trends: The implementation of stringent safety regulations, along

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with extensive research and development (R&D) activities, are anticipated to drive the market growth. In addition, various product innovations, such as the development of paste-based electrically conductive adhesives, are acting as other growth-inducing factors.

Competitive Landscape: Some of the prominent electrically conductive adhesives market companies include 3M Company, Aremco Products Inc., Creative Materials Inc., Dow Inc., H.B. Fuller Company, Henkel AG & Co. KGaA, Kemtron Ltd., Master Bond Inc., MG Chemicals, Panacol-Elosol GmbH (Dr. H?nle AG), Parker-Hannifin Corporation, and Permabond LLC, among many others.

Geographical Trends: According to the electrically conductive adhesives market dynamics, North America is a significant market for electrically conductive adhesives, driven by advancements in electronics manufacturing, aerospace, and automotive industries. Moreover, Europe is characterized by a robust automotive sector and increasing investments in renewable energy and electronic devices.

Challenges and Opportunities: Fluctuations in the prices of raw materials, and high competition are hampering the industry's demand. Moreover, the expanding electronics sector, driven by consumer electronics, automotive electronics, and smart devices, presents significant opportunities for ECAs.

Electrically Conductive Adhesives Market Trends:

Increasing Demand in the Electronics Sector

The increasing demand in the electronics sector significantly driving the growth of the Electrically Conductive Adhesives (ECAs) market. For instance, according to Invest India, electronic goods exports totaled US$ 2.97 billion in May 2024, up 22.97% from US$ 2.41 billion in May 2023. The consumer electronics industry is a major consumer of ECAs. With the proliferation of smartphones, tablets, wearable devices, and smart home technologies, there is a growing need for ECAs to facilitate the assembly of compact electronic components. For instance, according to an article published by Invest India, domestic electronics production in India was valued at US$ 101 billion in FY23 and based on FY22 data, mobile phones accounted for 43%, IT hardware (5%), consumer electronics (12%), strategic electronics (5%), industrial electronics (12%), and

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wearables and hearables (0.3%). These factors are further contributing to the electrically conductive adhesives market share.

Growing Renewable Energy Sector

The growing renewable energy sector is one of the prominent factors driving the growth of the Electrically Conductive Adhesives (ECAs) market. For instance, according to an article published by Invest India, India had the biggest year-on-year growth in renewable energy additions in 2022, at 9.83%. The installed solar energy capacity has expanded by 30 times in the last nine years, reaching 85.47 GW as of June 2024. ECAs are essential in the assembly of solar PV modules, where they facilitate the bonding of cells, busbars, and interconnects. These adhesives provide electrical conductivity between components, ensuring efficient current flow and enhancing the overall performance and reliability of solar panels. These factors are positively influencing the electrically conductive adhesives market forecast.

Rising Automotive Electronics

The growth of automotive electronics is proliferating the demand for Electrically Conductive Adhesives. The shift towards electric vehicles (EVs) is transforming the automotive industry, leading to increased adoption of ECAs. For instance, according to the IEA, in 2023, about 14 million new electric cars were registered globally, bringing the total number on the road to 40 million. Electric vehicle sales in 2023 were 3.5 million greater than in 2022, representing a 35% year-on-year growth. Electrically conductive adhesives are essential for bonding and sealing electronic components in EVs, including battery management systems, electric motors, power electronics, and charging infrastructure, thereby boosting the electrically conductive adhesives systems market revenue.

Global Electrically Conductive Adhesives Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global electrically conductive adhesives market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on type, chemistry, filler material, and application.

Breakup by Type:

Isotropic Conductive Adhesives

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Anisotropic Conductive Adhesives

The report has provided a detailed breakup and analysis of the electrically conductive adhesives market based on the type. This includes isotropic conductive adhesives and anisotropic conductive adhesives.

ICAs are commonly used in display technologies, such as LCDs (Liquid Crystal Displays) and OLEDs (Organic Light Emitting Diodes), for bonding flexible circuits, touch panels, and other electronic components. They provide uniform electrical conductivity in all directions, ensuring reliable electrical connections while maintaining mechanical flexibility. While ACAs are widely used in flat panel display manufacturing, particularly in LCDs and touchscreens. These adhesives contain conductive particles that create electrical pathways only in the vertical direction, enabling precise interconnection of pixels and electrodes without short-circuiting neighboring conductors.

Breakup by Chemistry:

Epoxy

Silicone

Acrylic

Polyurethane

Others

The report has provided a detailed breakup and analysis of the electrically conductive adhesives market based on the chemistry. This includes epoxy, silicone, acrylic, polyurethane, and others.

Epoxy-based ECAs offer excellent adhesion strength, mechanical durability, and chemical resistance. Moreover, silicone based ECAs offer flexibility, moisture resistance, and thermal stability over a wide temperature range. They provide electrical conductivity while maintaining elasticity and conformability, making them suitable for flexible and high-temperature applications. Apart from this, acrylic based ECAs offer fast

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curing times, excellent adhesion to various substrates, and resistance to weathering and UV exposure.

Breakup by Filler Material:

- Silver Fillers
- Carbon Fillers
- Copper Fillers
- Others

A detailed breakup and analysis of the electrically conductive adhesives market based on the filler material has also been provided in the report. This includes silver fillers, carbon fillers, copper fillers, and others.

Silver is one of the most conductive metals, offering high electrical conductivity. Silver fillers in ECAs provide low resistivity pathways for electrical current, ensuring efficient electrical connections between bonded surfaces. While carbon-based fillers (e.g., carbon nanotubes, carbon black) provide electrical conductivity through a network of carbon particles. Moreover, copper fillers provide good electrical conductivity and thermal stability. They offer an intermediate level of conductivity between silver and carbon, making them suitable for applications requiring moderate electrical performance.

Breakup by Application:

- Automotive
- Consumer Electronics
- Aerospace
- Biosciences
- Others

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A detailed breakup and analysis of the electrically conductive adhesives market based on the application has also been provided in the report. This includes automotive, consumer electronics, aerospace, biosciences, and others.

ECAs are used in automotive electronics for bonding and sealing electronic components, such as sensors, control units, LED lighting, and powertrain systems. While in consumer electronics, ECAs are used for bonding components in smartphones, tablets, laptops, wearables, and home appliances. Moreover, in aerospace applications, ECAs are used for bonding and sealing electronic components in aircraft systems, satellites, UAVs (unmanned aerial vehicles), and space exploration vehicles. Apart from this, in biosciences and medical devices, ECAs are used for bonding and sealing electronic components in diagnostic equipment, patient monitoring devices, wearable health monitors, and medical implants.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

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Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

North America is a significant market for ECAs, driven by a robust electronics industry, including consumer electronics, automotive electronics, aerospace, and medical devices. The presence of major electronics manufacturers, technological innovation hubs, and stringent regulatory standards contributes to market growth. Moreover, Europe is a mature market for ECAs, characterized by a strong presence of automotive manufacturers, aerospace industry leaders, and electronics producers. Apart from this, Asia-Pacific is one of the prominent regions for ECAs, driven by the presence of major

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electronics manufacturing hubs in countries like China, Japan, South Korea, and Taiwan. The region benefits from extensive electronics production, rapid industrialization, and increasing investments in automotive and consumer electronics sectors.

Competitive Landscape:

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major market companies have also been provided. Some of the key players in the market include:

3M Company

Aremco Products Inc.

Creative Materials Inc.

Dow Inc.

H.B. Fuller Company

Henkel AG & Co. KGaA

Kemtron Ltd.

Master Bond Inc.

MG Chemicals

Panacol-Elosol GmbH (Dr. H?nle AG)

Parker-Hannifin Corporation

Permabond LLC

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

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Electrically Conductive Adhesives Market Recent Developments:

October 2023: Bostik unveiled its new thermal conductive adhesive range at the India Battery show 2023.

October 2023: DuPont launched DuPont Liveo Soft Skin Conductive Tape 1-3150, a silicone-based thermoset adhesive for electrical biosignal sensing and transfer.

May 2023: Henkel adhesive Technologies, a global provider in automotive adhesives, sealants, thermal materials, and functional coatings, launched its line of solutions for EV battery systems with an injectable thermally conductive glue.

Key Questions Answered in This Report:

How has the global electrically conductive adhesives market performed so far and how will it perform in the coming years?

What has been the impact of COVID-19 on the global electrically conductive adhesives market?

What are the key regional markets?

What is the breakup of the market based on the type?

What is the breakup of the market based on the chemistry?

What is the breakup of the market based on the filler material?

What is the breakup of the market based on the application?

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global electrically conductive adhesives market and who are the key players?

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What is the degree of competition in the industry?

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