

Thermal Interface Materials Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028

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Abstracts

Market Overview:

The global thermal interface materials market size reached US\$ 3.2 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 5.5 Billion by 2028, exhibiting a growth rate (CAGR) of 9.4% during 2023-2028. The increasing demand for efficient thermal management solutions, the development of new TIM formulations and technologies, the rising demand for electronic devices, the miniaturization of electronic components, and the rapid technological advancements in semiconductor technology are some factors propelling the market.

Thermal interface materials (TIMs) are critical in efficiently transferring heat between two surfaces in various electronic devices. Their primary function is filling gaps and air pockets between components, such as microprocessors, power transistors, LED modules, and heat sinks or spreaders, ensuring maximum heat dissipation. They are designed to have high thermal conductivity and low thermal resistance to facilitate heat transfer. They are available in different forms, including thermal greases, pads, phase change materials, and adhesives. Each type of TIM has unique properties and applications, catering to specific requirements. The importance of TIMs lies in their ability to reduce thermal resistance and prevent overheating, which can negatively impact electronic devices, performance, reliability, and lifespan. By facilitating efficient heat dissipation, TIMs help maintain optimal operating temperatures, prevent thermal throttling, and enhance overall system performance.

The global market is majorly driven by the growing use of electronic devices, such as smartphones, laptops, and automotive electronics. In line with this, the rapid

advancements in semiconductor technology, including higher power densities and increased component integration, are significantly contributing to the market. Furthermore, the increasing production of electric vehicles requires effective thermal management to handle the heat generated by batteries, power electronics, and electric motors, positively influencing the market. Apart from this, the rising data center infrastructure is catalyzing the market. Moreover, the escalating need to improve energy efficiency in electronic devices accelerates product adoption, as they help prevent overheating, reduce power consumption, and enhance overall energy efficiency. Besides, the increasing research and development efforts led to the development of new TIM formulations with improved thermal conductivity, reliability, and ease of application, offering numerous opportunities for the market. Additionally, the regulatory standards and guidelines in various industries, such as automotive and aerospace, mandate effective thermal management to ensure safety and reliability, contributing to the market growth.

Thermal Interface Materials Market Trends/Drivers:

Significant growth in the consumer electronics industry

Considerable growth in the consumer electronics industry is favorably impacting the market. The consumer electronics sector encompasses a wide range of devices, including smartphones, tablets, laptops, gaming consoles, smart home devices, and wearable technology. As this industry expands, the demand for TIMs rises in parallel. Consumer electronic devices are becoming increasingly compact, powerful, and energy-efficient. However, these advancements also generate more heat within the devices. TIMs play a crucial role in effectively dissipating this heat, ensuring the proper functioning and longevity of the electronic components. Moreover, consumers have higher expectations for device performance and reliability. Overheating can reduce performance, system failures, and even safety hazards. Therefore, manufacturers prioritize effective thermal management using TIMs to meet consumer demands for efficient cooling solutions. Additionally, the introduction of new and innovative consumer electronic devices constantly drives the need for advanced TIM formulations that offer improved thermal conductivity, reliability, and ease of application. The continuous growth and innovation in the consumer electronics industry significantly contribute to the market.

Increasing awareness regarding heat-related issues

The increasing awareness regarding the adverse effects of overheating on device

performance and lifespan is strengthening the market. As technology advances and devices become more compact and powerful, managing heat becomes critical. Heat-related issues can reduce performance, system failures, and even safety hazards. The growing awareness of these issues has prompted manufacturers, engineers, and consumers to prioritize effective thermal management using TIMs. Industry professionals increasingly recognize the importance of selecting appropriate TIMs to optimize heat dissipation and ensure the reliable operation of electronic components. Furthermore, consumers are becoming more informed about the impact of heat on device performance and lifespan. They seek electronic devices that can withstand demanding tasks without overheating or experiencing thermal throttling. As a result, device manufacturers integrate high-quality TIMs to enhance heat transfer and maintain optimal operating temperatures, improving consumer satisfaction and product reliability. The increasing awareness of heat-related issues and the desire for efficient and reliable electronic devices drive the adoption and demand for TIMs in various industries, including consumer electronics, automotive, telecommunications, and data centers.

Growing demand for high-performance computing

The growing demand for high-performance computing (HPC) is fostering the market. HPC applications, such as artificial intelligence, machine learning, data analytics, and scientific simulations, require powerful processors and advanced hardware configurations that generate substantial heat. Efficient thermal management is crucial in HPC systems to maintain optimal performance and prevent overheating. TIMs facilitate heat transfer between high-performance processors, graphics cards, other components, and heat sinks or cooling solutions. As the demand for HPC continues to rise across industries, such as finance, healthcare, research, and entertainment, the need for advanced TIMs increases. These materials must have high thermal conductivity, low thermal resistance, and reliability to meet the demands of HPC applications. Additionally, the ongoing advancements in HPC technologies, such as the development of more powerful processors and GPUs, catalyze the need for advanced TIM formulations that can handle higher heat loads and provide efficient thermal management. The growing demand for high-performance computing and the critical role of TIMs in ensuring thermal efficiency is a key factor propelling the market.

Thermal Interface Materials Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global thermal interface materials market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on

product type and application.

Breakup by Product Type:

Tapes and Films

Elastomeric Pads

Greases and Adhesives

Phase Change Materials

Metal Based Materials

Others

Greases and adhesives dominate the market

The report has provided a detailed breakup and analysis of the market based on product type. This includes tapes and films, elastomeric pads, greases and adhesives, phase change materials, metal based materials, and others. According to the report, greases and adhesives represented the largest segment.

Greases and adhesives are widely used in various industries for their thermal conductivity, ease of application, and ability to fill gaps and voids between components. They are commonly used in electronic devices to facilitate heat transfer between components and heat sinks, ensuring efficient thermal management and preventing overheating.

A considerable rise in electric vehicle production rates across the globe is a significant factor driving the demand for greases and adhesives. Electric vehicles generate substantial heat from batteries, power electronics, and motors. Greases and adhesives provide effective thermal conductivity and help dissipate heat in these components, contributing to overall performance and longevity.

Breakup by Application:

Telecom

Computer

Medical Devices

Industrial Machinery

Consumer Durables

Automotive Electronics

Others

Computer holds the largest share of the market

A detailed breakup and analysis of the market based on the application have also been provided in the report. This includes telecom, computer, medical devices, industrial machinery, consumer durables, automotive electronics, and others. According to the report, computer accounted for the largest market share.

The need for effective thermal management solutions has become crucial with the continuous advancement in computer technology and the increasing demand for high-performance computing devices. Computers often use thermal interface materials to enhance heat dissipation and improve the overall thermal performance of components such as processors, graphics cards, and memory modules. These materials help to efficiently transfer heat generated by these components to heat sinks or other cooling mechanisms, preventing overheating and ensuring optimal operation.

As computer systems become more powerful and compact, the thermal challenges intensify. The miniaturization of electronic components leads to higher power densities and increased heat generation. This necessitates using advanced thermal interface materials that offer superior thermal conductivity, low thermal resistance, and reliable performance under varying conditions. Moreover, the growing demand for gaming PCs, data centers, and cloud computing infrastructure further drives the adoption of thermal interface materials in the computer segment. The need to maintain stable operating temperatures and improve energy efficiency fuels the market growth, prompting manufacturers to develop innovative thermal interface materials that can meet the evolving demands of the computer industry.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest thermal interface materials market share

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

The Asia Pacific region is a major market for thermal interface materials market due to rapid industrialization, technological advancements, and the presence of major electronics and semiconductor manufacturing hubs. Asia Pacific is home to several key countries, major producers, and consumers of electronic devices and components. The region's dominance in the consumer electronics, automotive, and telecommunications sectors drives the need for effective thermal management solutions to ensure optimal performance and reliability of electronic systems.

Furthermore, the rising trend of urbanization, growing disposable incomes, and expanding middle-class population in the Asia Pacific region contribute to the increased adoption of electronic devices such as smartphones, laptops, and gaming consoles. This, in turn, fuels the demand for thermal interface materials to address the thermal challenges associated with these devices. Moreover, the region's increasing focus on energy efficiency, environmental sustainability, and regulations regarding thermal management in electronics further catalyzes the market. Manufacturers in the Asia Pacific are investing in research and development activities to develop advanced thermal interface materials that offer high thermal conductivity, low thermal resistance, and environmental friendliness.

Competitive Landscape:

Top thermal interface materials companies are crucial in catalyzing the market through innovative solutions and extensive research and development efforts. These companies are at the forefront of developing advanced thermal interface materials that cater to the evolving needs of various industries. They invest heavily in research and development to enhance their products' thermal conductivity, durability, and reliability. They work closely with manufacturers and customers to understand their requirements and develop tailored solutions for thermal management challenges. Additionally, these companies focus on expanding their product portfolios to offer a wide range of thermal interface materials suitable for different applications and industries. They also emphasize collaboration and strategic partnerships to leverage complementary technologies and expertise, enabling them to deliver comprehensive thermal management solutions. Through their continuous innovation, quality products, and strong customer relationships, these top thermal interface materials companies are propelling the market by setting industry standards and meeting the growing demand for efficient thermal management solutions across various sectors.

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

3M Company

Dow Inc.

Henkel AG & Co. KGaA

Honeywell International Inc.

Indium Corporation

Kitagawa Industries America Inc.

Laird Technologies Inc.

Momentive Performance Materials Inc.

Parker-Hannifin Corporation

Zalman Tech Co. Ltd.

Recent Developments:

In July 2021, Dow launched DOWSIL TC-4551 CV Gap Filler, DOWSIL TC-2035 CV Adhesive, and DOWSIL TC-4060 GB250 Thermal Gel. These silicone-based thermal interface materials are aimed at electronics applications for electric and hybrid-electric vehicles.

In April 2022, Shin-Etsu Chemical Co., Ltd. launched a new thermal interface silicone rubber sheet designed for applications in electric vehicles.

In May 2022, Ariecca partnered with ROHM Co., Ltd. for a joint research agreement to develop next-generation thermal interface materials for the EV market.

Key Questions Answered in This Report

1. What was the size of the global thermal interface materials market in 2022?
2. What is the expected growth rate of the global thermal interface materials market during 2023-2028?
3. What are the key factors driving the global thermal interface materials market?
4. What has been the impact of COVID-19 on the global thermal interface materials market?
5. What is the breakup of the global thermal interface materials market based on the product type?
6. What is the breakup of the global thermal interface materials market based on the application?
7. What are the key regions in the global thermal interface materials market?
8. Who are the key players/companies in the global thermal interface materials market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL THERMAL INTERFACE MATERIALS MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY PRODUCT TYPE

- 6.1 Tapes and Films
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Elastomeric Pads
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Greases and Adhesives

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Phase Change Materials
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Metal Based Materials
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 Others
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast

7 MARKET BREAKUP BY APPLICATION

- 7.1 Telecom
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Computer
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Medical Devices
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Industrial Machinery
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Consumer Durables
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast
- 7.6 Automotive Electronics
 - 7.6.1 Market Trends
 - 7.6.2 Market Forecast
- 7.7 Others
 - 7.7.1 Market Trends
 - 7.7.2 Market Forecast

8 MARKET BREAKUP BY REGION

- 8.1 North America

- 8.1.1 United States
 - 8.1.1.1 Market Trends
 - 8.1.1.2 Market Forecast
- 8.1.2 Canada
 - 8.1.2.1 Market Trends
 - 8.1.2.2 Market Forecast
- 8.2 Asia Pacific
 - 8.2.1 China
 - 8.2.1.1 Market Trends
 - 8.2.1.2 Market Forecast
 - 8.2.2 Japan
 - 8.2.2.1 Market Trends
 - 8.2.2.2 Market Forecast
 - 8.2.3 India
 - 8.2.3.1 Market Trends
 - 8.2.3.2 Market Forecast
 - 8.2.4 South Korea
 - 8.2.4.1 Market Trends
 - 8.2.4.2 Market Forecast
 - 8.2.5 Australia
 - 8.2.5.1 Market Trends
 - 8.2.5.2 Market Forecast
 - 8.2.6 Indonesia
 - 8.2.6.1 Market Trends
 - 8.2.6.2 Market Forecast
 - 8.2.7 Others
 - 8.2.7.1 Market Trends
 - 8.2.7.2 Market Forecast
- 8.3 Europe
 - 8.3.1 Germany
 - 8.3.1.1 Market Trends
 - 8.3.1.2 Market Forecast
 - 8.3.2 France
 - 8.3.2.1 Market Trends
 - 8.3.2.2 Market Forecast
 - 8.3.3 United Kingdom
 - 8.3.3.1 Market Trends
 - 8.3.3.2 Market Forecast
 - 8.3.4 Italy

- 8.3.4.1 Market Trends
- 8.3.4.2 Market Forecast
- 8.3.5 Spain
 - 8.3.5.1 Market Trends
 - 8.3.5.2 Market Forecast
- 8.3.6 Russia
 - 8.3.6.1 Market Trends
 - 8.3.6.2 Market Forecast
- 8.3.7 Others
 - 8.3.7.1 Market Trends
 - 8.3.7.2 Market Forecast
- 8.4 Latin America
 - 8.4.1 Brazil
 - 8.4.1.1 Market Trends
 - 8.4.1.2 Market Forecast
 - 8.4.2 Mexico
 - 8.4.2.1 Market Trends
 - 8.4.2.2 Market Forecast
 - 8.4.3 Others
 - 8.4.3.1 Market Trends
 - 8.4.3.2 Market Forecast
- 8.5 Middle East and Africa
 - 8.5.1 Market Trends
 - 8.5.2 Market Breakup by Country
 - 8.5.3 Market Forecast

9 SWOT ANALYSIS

- 9.1 Overview
- 9.2 Strengths
- 9.3 Weaknesses
- 9.4 Opportunities
- 9.5 Threats

10 VALUE CHAIN ANALYSIS

11 PORTERS FIVE FORCES ANALYSIS

- 11.1 Overview

- 11.2 Bargaining Power of Buyers
- 11.3 Bargaining Power of Suppliers
- 11.4 Degree of Competition
- 11.5 Threat of New Entrants
- 11.6 Threat of Substitutes

12 PRICE INDICATORS

13 COMPETITIVE LANDSCAPE

- 13.1 Market Structure
- 13.2 Key Players
- 13.3 Profiles of Key Players
 - 13.3.1 3M Company
 - 13.3.1.1 Company Overview
 - 13.3.1.2 Product Portfolio
 - 13.3.1.3 Financials
 - 13.3.1.4 SWOT Analysis
 - 13.3.2 Dow Inc.
 - 13.3.2.1 Company Overview
 - 13.3.2.2 Product Portfolio
 - 13.3.2.3 Financials
 - 13.3.3 Henkel AG & Co. KGaA
 - 13.3.3.1 Company Overview
 - 13.3.3.2 Product Portfolio
 - 13.3.3.3 Financials
 - 13.3.3.4 SWOT Analysis
 - 13.3.4 Honeywell International Inc.
 - 13.3.4.1 Company Overview
 - 13.3.4.2 Product Portfolio
 - 13.3.4.3 Financials
 - 13.3.4.4 SWOT Analysis
 - 13.3.5 Indium Corporation
 - 13.3.5.1 Company Overview
 - 13.3.5.2 Product Portfolio
 - 13.3.6 Kitagawa Industries America Inc.
 - 13.3.6.1 Company Overview
 - 13.3.6.2 Product Portfolio
 - 13.3.7 Laird Technologies Inc.

- 13.3.7.1 Company Overview
- 13.3.7.2 Product Portfolio
- 13.3.8 Momentive Performance Materials Inc.
 - 13.3.8.1 Company Overview
 - 13.3.8.2 Product Portfolio
- 13.3.9 Parker-Hannifin Corporation
 - 13.3.9.1 Company Overview
 - 13.3.9.2 Product Portfolio
 - 13.3.9.3 Financials
 - 13.3.9.4 SWOT Analysis
- 13.3.10 Zalman Tech Co., Ltd.
 - 13.3.10.1 Company Overview
 - 13.3.10.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Thermal Interface Materials Market: Key Industry Highlights, 2022 and 2028

Table 2: Global: Thermal Interface Materials Market Forecast: Breakup by Product Type (in Million US\$), 2023-2028

Table 3: Global: Thermal Interface Materials Market Forecast: Breakup by Application (in Million US\$), 2023-2028

Table 4: Global: Thermal Interface Materials Market Forecast: Breakup by Region (in Million US\$), 2023-2028

Table 5: Global: Thermal Interface Materials Market: Competitive Structure

Table 6: Global: Thermal Interface Materials Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Thermal Interface Materials Market: Major Drivers and Challenges

Figure 2: Global: Thermal Interface Materials Market: Sales Value (in Billion US\$), 2017-2022

Figure 3: Global: Thermal Interface Materials Market: Breakup by Product Type (in %), 2022

Figure 4: Global: Thermal Interface Materials Market: Breakup by Application (in %), 2022

Figure 5: Global: Thermal Interface Materials Market: Breakup by Region (in %), 2022

Figure 6: Global: Thermal Interface Materials Market Forecast: Sales Value (in Billion US\$), 2023-2028

Figure 7: Global: Thermal Interface Materials (Tapes and Films) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 8: Global: Thermal Interface Materials (Tapes and Films) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 9: Global: Thermal Interface Materials (Elastomeric Pads) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 10: Global: Thermal Interface Materials (Elastomeric Pads) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 11: Global: Thermal Interface Materials (Greases and Adhesives) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 12: Global: Thermal Interface Materials (Greases and Adhesives) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 13: Global: Thermal Interface Materials (Phase Change Materials) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 14: Global: Thermal Interface Materials (Phase Change Materials) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 15: Global: Thermal Interface Materials (Metal Based Materials) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 16: Global: Thermal Interface Materials (Metal Based Materials) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 17: Global: Thermal Interface Materials (Others) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 18: Global: Thermal Interface Materials (Others) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 19: Global: Thermal Interface Materials (Telecom) Market: Sales Value (in Million

US\$), 2017 & 2022

Figure 20: Global: Thermal Interface Materials (Telecom) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 21: Global: Thermal Interface Materials (Computer) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 22: Global: Thermal Interface Materials (Computer) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 23: Global: Thermal Interface Materials (Medical Devices) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 24: Global: Thermal Interface Materials (Medical Devices) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 25: Global: Thermal Interface Materials (Industrial Machinery) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 26: Global: Thermal Interface Materials (Industrial Machinery) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 27: Global: Thermal Interface Materials (Consumer Durables) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 28: Global: Thermal Interface Materials (Consumer Durables) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 29: Global: Thermal Interface Materials (Automotive Electronics) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 30: Global: Thermal Interface Materials (Automotive Electronics) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 31: Global: Thermal Interface Materials (Others) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 32: Global: Thermal Interface Materials (Others) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 33: North America: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 34: North America: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 35: United States: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 36: United States: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 37: Canada: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 38: Canada: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 39: Asia Pacific: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 40: Asia Pacific: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 41: China: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 42: China: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 43: Japan: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 44: Japan: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 45: India: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 46: India: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 47: South Korea: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 48: South Korea: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 49: Australia: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 50: Australia: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 51: Indonesia: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 52: Indonesia: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 53: Others: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 54: Others: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 55: Europe: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 56: Europe: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 57: Germany: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 58: Germany: Thermal Interface Materials Market Forecast: Sales Value (in

Million US\$), 2023-2028

Figure 59: France: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 60: France: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 61: United Kingdom: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 62: United Kingdom: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 63: Italy: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 64: Italy: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 65: Spain: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 66: Spain: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 67: Russia: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 68: Russia: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 69: Others: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 70: Others: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 71: Latin America: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 72: Latin America: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 73: Brazil: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 74: Brazil: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 75: Mexico: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 76: Mexico: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 77: Others: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 78: Others: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 79: Middle East and Africa: Thermal Interface Materials Market: Sales Value (in Million US\$), 2017 & 2022

Figure 80: Middle East and Africa: Thermal Interface Materials Market: Breakup by Country (in %), 2022

Figure 81: Middle East and Africa: Thermal Interface Materials Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 82: Global: Thermal Interface Materials Industry: SWOT Analysis

Figure 83: Global: Thermal Interface Materials Industry: Value Chain Analysis

Figure 84: Global: Thermal Interface Materials Industry: Porter's Five Forces Analysis

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