

Global AI Server Thermal Interface Materials Market Growth 2026-2032

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Abstracts

The global AI Server Thermal Interface Materials market size is predicted to grow from US\$ 455 million in 2025 to US\$ 1560 million in 2032; it is expected to grow at a CAGR of 18.9% from 2026 to 2032.

AI server thermal interface materials are functional materials placed between GPUs, AI accelerators, CPUs, HBM, power modules, or high-speed optical modules and heat spreaders, heat sinks, or cold plates. They fill microscopic gaps, reduce contact thermal resistance, and improve heat transfer. Major products include thermal greases, phase change materials, gap pads, dispensable thermal gels, thermally conductive tapes and adhesives, and metallic TIMs. Key requirements include low thermal resistance, pump-out resistance, compressibility, electrical insulation or controlled conductivity, low volatility, and long-term thermal cycling reliability. The blended gross margin is approximately 48%.

Rising AI compute density is increasing accelerator power, HBM stack counts, and board-level power delivery loads, while server thermal architectures are shifting from air cooling toward direct-to-chip cold plates and hybrid liquid cooling. Heat must be transferred rapidly from bare dies, packages, memory, power devices, and optical modules to heat sinks or cold plates, raising both TIM content and value per server.

Product development is moving beyond nominal bulk thermal conductivity toward interface resistance under assembly pressure, long-term pump-out stability, low volatility, and dispensing consistency. Phase change materials, low-modulus high-conductivity gels, silicone-free products, and metallic TIMs are gaining adoption at high heat-flux interfaces, while bond-line control, wettability, and thermal cycling reliability are becoming central qualification criteria.

International material suppliers retain an advantage in high-end TIM 1 and TIM 1.5 products because of formulation know-how, precision coating capabilities, and accumulated reliability data. Suppliers from mainland China and Taiwan are entering server supply chains through gap pads, gels, and die-cut components. Key opportunities include local substitution, co-development with liquid-cooling cold plates, and optical-module thermal upgrades, while major risks include long customer qualification cycles, conductive-filler price volatility, patent constraints, and product substitution caused by changes in packaging and cooling architectures.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "AI Server Thermal Interface Materials Industry Forecast" looks at past sales and reviews total world AI Server Thermal Interface Materials sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Server Thermal Interface Materials sales for 2026 through 2032. With AI Server Thermal Interface Materials sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Server Thermal Interface Materials industry.

This Insight Report provides a comprehensive analysis of the global AI Server Thermal Interface Materials landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Server Thermal Interface Materials portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Server Thermal Interface Materials market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Server Thermal Interface Materials and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Server Thermal Interface Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Server Thermal Interface Materials market by product type,

application, key manufacturers and key regions and countries.

Segmentation by Type:

Thermal Greases and Compounds

Phase Change Materials

Thermal Gap Pads

Dispensable Gap Fillers and Thermal Gels

Thermally Conductive Adhesives and Tapes

Metallic Thermal Interface Materials

Segmentation by Thermal Conductivity:

Up to 3 W/m·K

Above 3 to 6 W/m·K

Above 6 to 10 W/m·K

Above 10 W/m·K

Segmentation by Matrix Material:

Silicone-Based Materials

Acrylic-Based Materials

Epoxy-Based Materials

Hydrocarbon and Wax-Based Materials

Carbon-Based Materials

Metal-Based Materials

Other Polymer-Based Materials

Segmentation by Interface Position:

TIM 1: Die to Heat Spreader

TIM 1.5: Bare Die to Heat Sink or Cold Plate

TIM 2: Package or Heat Spreader to Heat Sink or Cold Plate

Board-Level Components to Chassis or Cold Plate

Optical Modules to Heat Sinks

Other Server Thermal Interfaces

Segmentation by Application:

AI Accelerators and GPUs

Server CPUs and Custom ASICs

High-Bandwidth Memory and Memory Modules

Power Supply and Voltage Regulation

High-Speed Optical Modules and Network Equipment

Other Server Electronics

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Henkel

Parker Hannifin

DuPont

3M

Solstice Advanced Materials

Dow

Shin-Etsu Chemical

Momentive

Wacker Chemie

Fujipoly

Denka

Panasonic Industry

Indium Corporation

Nitto Denko

Saint-Gobain

T-Global Technology

Jones Tech

FRD

GLPOLY

Boyd

Wakefield Thermal

LiPOLY

Sekisui Chemical

Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Server Thermal Interface Materials market?

What factors are driving AI Server Thermal Interface Materials market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Server Thermal Interface Materials market opportunities vary by end market size?

How does AI Server Thermal Interface Materials break out by Type, by Application?

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