

# Global BN-Based Thermally Conductive Insulating Sheets Market Growth 2026-2032

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## Abstracts

The global BN-Based Thermally Conductive Insulating Sheets market size is predicted to grow from US\$ 94.81 million in 2025 to US\$ 231 million in 2032; it is expected to grow at a CAGR of 13.4% from 2026 to 2032.

In 2025, global BN-Based Thermally Conductive Insulating Sheets sales reached approximately 103 K Sqm with an average global market price of around 945 USD per Sqm.

BN-Based Thermally Conductive Insulating Sheets are sheet-type thermal management materials in which hexagonal boron nitride powder, BN platelets, spherical or agglomerated BN, or BN-based composite fillers serve as the key thermally conductive functional phase. These fillers are compounded with silicone rubber, silicone gel, polyimide, epoxy, acrylic resin, or other polymer matrices to form electrically insulating thermal interface sheets. The product combines thermal conductivity, electrical insulation, low dielectric loss, heat resistance, and dimensional stability, and is mainly used to create stable heat-dissipation paths for power devices, battery modules, semiconductor packages, telecom equipment, servers, LEDs, automotive electronics, and high-frequency electronic components while avoiding short-circuit risks. Compared with conventional alumina-filled silicone thermal pads, BN-based materials are more suitable for applications requiring higher insulation, higher thermal conductivity, lower dielectric loss, or high-frequency performance. Compared with graphite sheets, their main advantage lies in electrical insulation and tunable anisotropic thermal design.

The typical production process of BN-based thermally conductive insulating sheets includes BN powder preparation or selection, surface modification, high-dispersion mixing, calendaring, coating, hot pressing or composite forming, curing, slitting or die-

cutting, and reliability testing. The core barriers are BN particle size and morphology control, platelet orientation design, high-filler loading dispersion, interfacial bonding, thickness tolerance, dielectric strength, flexibility, and long-term thermal aging stability. Gross margins are generally higher than those of standard silicone thermal pads: standard BN-filled thermal insulating sheets are typically around 30%–45%; high-conductivity, low-dielectric, low-volatility, or customized die-cut products for power semiconductors, EVs, servers, and 5G high-frequency applications are usually around 40%–60%; small-volume high-end products using high-purity BN, spherical BN, oriented BN, or reinforced composite structures may achieve even higher margins, but with higher R&D costs and longer qualification cycles. The upstream chain includes boron sources, nitrogen sources, high-purity BN powders, silicone rubber or resins, release films, glass fiber or PI reinforcement films, and additives. Midstream activities include formulation, composite forming, and precision die-cutting. Downstream applications include semiconductor packaging, traction batteries, energy storage, automotive electronics, power modules, telecom equipment, servers, and industrial electronics.

### Market Development Opportunities & Main Driving Factors

The market opportunity for BN-based thermally conductive insulating sheets is driven by the simultaneous demand for thermal conductivity, insulation, and reliability in high-power electronics, electrification, and high-frequency high-speed electronic systems. EV battery packs, onboard chargers, inverters, DC-DC converters, SiC/GaN power modules, AI servers, data-center power supplies, 5G telecom equipment, high-frequency PCBs, and advanced packaging are all pushing thermal insulating materials toward higher performance. The IEA's Global EV Outlook 2025 shows that global electric car sales rose by 35% year-on-year in the first quarter of 2025 and are expected to exceed 20 million units for the full year; the IEA's Energy and AI report also projects global data-center electricity consumption to reach around 945 TWh by 2030, nearly doubling. The expansion of electric vehicles and AI data centers is elevating thermal management materials from auxiliary consumables to key materials for system reliability, and BN-based sheets are gaining stronger attention in high-end thermal interface materials due to their electrical insulation, low dielectric loss, and thermal stability.

### Market Challenges, Risks, & Restraints

The main challenges in this market are the high cost of performance-grade BN powders, relatively concentrated high-quality filler supply, processing difficulty, and long customer qualification cycles. BN has a platelet structure and anisotropic thermal

conductivity, so insufficient control of orientation, filler loading, and surface modification can lead to inadequate through-plane conductivity, reduced flexibility, higher processing viscosity, or sheet brittleness. Compared with conventional fillers such as alumina and zinc oxide, BN is more expensive, which limits penetration in low-to-mid-end consumer electronics and standard power supply markets. High-end automotive electronics, servers, semiconductor packaging, and power-module customers usually require long-cycle reliability validation, including thermal cycling, dielectric withstand testing, flame retardancy, low volatility, low ionic contamination, and batch consistency. This makes rapid scaling difficult for new entrants even when sample-level capability is available. Future competition will focus on powder morphology, composite structure, low-dielectric design, thin-form-factor processing, automated placement compatibility, and joint development capability with key customers.

### Downstream Demand Trends

Downstream demand is shifting from standard thermal pads toward high-performance thermally conductive insulating composites, low-dielectric thermal sheets, flexible ceramic composite sheets, and power-device-specific thermal interface materials. Consumer electronics remains the volume base, while faster-growing demand is coming from EVs, energy storage, photovoltaic inverters, server power supplies, AI accelerator cards, telecom base stations, millimeter-wave and high-frequency circuits, and advanced packaging. 3M highlights BN cooling fillers as a way to improve polymer thermal conductivity while maintaining electrical insulation, and Saint-Gobain emphasizes that BN can enhance both dielectric and thermal performance in composites, indicating that BN-based materials are evolving from single-purpose thermal fillers into integrated solutions for high-frequency electronics, thermal management, and insulation reliability. Future customers will focus more on high through-plane thermal conductivity, low compression stress, low dielectric loss, low siloxane outgassing, high dielectric breakdown voltage, heat-aging resistance, and precision die-cut capability. Product forms are expected to expand from standard sheets to large-format battery gap pads, insulating thermal sheets for power modules, low-loss 5G thermal sheets, and semiconductor packaging heat-spreading composites.

LP Information, Inc. (LPI) ' newest research report, the "BN-Based Thermally Conductive Insulating Sheets Industry Forecast" looks at past sales and reviews total world BN-Based Thermally Conductive Insulating Sheets sales in 2025, providing a comprehensive analysis by region and market sector of projected BN-Based Thermally Conductive Insulating Sheets sales for 2026 through 2032. With BN-Based Thermally Conductive Insulating Sheets sales broken down by region, market sector and sub-

sector, this report provides a detailed analysis in US\$ millions of the world BN-Based Thermally Conductive Insulating Sheets industry.

This Insight Report provides a comprehensive analysis of the global BN-Based Thermally Conductive Insulating Sheets 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 BN-Based Thermally Conductive Insulating Sheets portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global BN-Based Thermally Conductive Insulating Sheets market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for BN-Based Thermally Conductive Insulating Sheets 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 BN-Based Thermally Conductive Insulating Sheets.

This report presents a comprehensive overview, market shares, and growth opportunities of BN-Based Thermally Conductive Insulating Sheets market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Epoxy Composite

Silicone Composite

Polyimide Composite

PDMS Composite

Others

#### Segmentation by BN Functional Phase:

h-BN Platelet Filler

Agglomerated BN Filler

2D BN Nanosheets

Oriented BN Filler Network

Others

Segmentation by Thermal Conductivity Grade:

Standard Grade (12 W/mK)

Segmentation by Manufacturing Process:

Tape Casting

Hot-Pressing

Others

Segmentation by Application:

EV & Transportation

Telecommunications & ICT

Semiconductors & Microelectronics

Industrial Energy & Power

Aerospace & Defense

Others

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.

Mitsubishi Chemical

Denka

Bando Chemical Industries

Dexerials

Qnity Electronics

Guangdong Surpons Technology

Dongguan U-Sheen

Ziitek

RISHO KOGYO

Huasee Electronic Technology

Yamamura Photonics

### Key Questions Addressed in this Report

What is the 10-year outlook for the global BN-Based Thermally Conductive Insulating Sheets market?

What factors are driving BN-Based Thermally Conductive Insulating Sheets market growth, globally and by region?

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

How do BN-Based Thermally Conductive Insulating Sheets market opportunities vary by end market size?

How does BN-Based Thermally Conductive Insulating Sheets break out by Type, by Application?



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