

Global EV Battery Pack Thermal Conductive Gel Market Growth 2026-2032

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Abstracts

The global EV Battery Pack Thermal Conductive Gel market size is predicted to grow from US\$ 611 million in 2025 to US\$ 1575 million in 2032; it is expected to grow at a CAGR of 14.7% from 2026 to 2032.

In 2025, mainstream EV battery pack thermal conductive gel products are typically priced at approximately USD 18-32 per kilogram, while automotive-grade high-performance formulations generally maintain gross margins of 28%-45%. This market primarily focuses on liquid or semi-liquid thermal interface gel materials used inside EV and PHEV battery pack thermal management systems, including battery pack gap filler gels, thermal conductive gels between battery cells and cooling plates, module-level thermal interface gels, two-component dispensable thermal gels, and silicone-based or polyurethane-based battery TIM gel systems. These materials are commonly formulated using silicone, polyurethane, or modified polymer matrices combined with highly thermally conductive ceramic fillers, and are manufactured through low-modulus structural design, vacuum deaeration, two-component mixing, automated dispensing, and curing processes to achieve efficient heat transfer and long-term reliability management. Key performance specifications typically include thermal conductivity, dielectric strength, compressibility, flame retardancy, volatile emission control, thermal cycling durability, and long-term aging stability. With the rapid development of CTP and CTC battery architectures, large cylindrical battery platforms, 800V high-voltage fast-charging systems, and high-energy-density EV battery technologies, thermal density and thermal uniformity requirements inside battery packs are increasing significantly. As a result, thermal conductive gels are evolving from localized thermal interface auxiliary materials into critical full-pack thermal management materials and are now widely used in BEV passenger vehicles, PHEV systems, electric commercial vehicles, and highly integrated battery pack platforms to improve battery safety, thermal stability, cycle life,

and high-power operating performance.

According to our research, Battery Pack Thermal Conductive Gel has become one of the fastest-growing segments within the global thermal interface materials industry, driven primarily by the rapid expansion of electric vehicles and the increasing complexity of battery thermal management systems. As EV battery architectures continue evolving toward higher energy density, larger pack capacity, ultra-fast charging capability, and integrated CTP/CTC structures, conventional thermal pads and solid TIM materials are increasingly unable to meet the requirements for gap-filling flexibility, thermal cycling durability, and automated dispensing compatibility. As a result, liquid and dispensable thermal conductive gels with low modulus, high conformability, and reliable long-term thermal stability are rapidly becoming the preferred solution for battery pack thermal management applications. From the supply-side perspective, the high-end market remains largely dominated by established material companies from Europe, the United States, and Japan, particularly in silicone-based thermal gel systems with strong automotive qualification capabilities and global OEM customer relationships. However, Chinese domestic manufacturers are rapidly gaining market share due to the localization trend of the EV supply chain and the explosive growth of China's battery manufacturing ecosystem. Several Chinese suppliers have already entered the procurement systems of leading battery manufacturers and EV OEMs. Meanwhile, suppliers from South Korea and Taiwan are leveraging their existing silicone material and electronic adhesive capabilities to expand into EV thermal management applications. Industry dynamics indicate continued capacity expansion, regional supply chain relocation, and increasing capital investment into thermal interface material production, especially in China. From the demand structure perspective, EV battery packs remain the dominant application segment, while energy storage systems are emerging as a secondary growth engine. Large-format battery cells, structural battery pack designs, and fast-charging platforms are significantly increasing thermal conductive gel consumption per vehicle. Looking ahead, industry competition is expected to shift away from purely thermal conductivity metrics toward comprehensive performance capabilities, including dispensing efficiency, long-term reliability, flame retardancy, low density, oil bleed resistance, and compatibility with automated manufacturing systems. As battery safety regulations continue tightening globally and thermal runaway mitigation becomes increasingly important, high-performance battery thermal conductive gels are expected to maintain strong long-term growth momentum through the next decade.

LP Information, Inc. (LPI) ' newest research report, the "EV Battery Pack Thermal Conductive Gel Industry Forecast" looks at past sales and reviews total world EV

Battery Pack Thermal Conductive Gel sales in 2025, providing a comprehensive analysis by region and market sector of projected EV Battery Pack Thermal Conductive Gel sales for 2026 through 2032. With EV Battery Pack Thermal Conductive Gel sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world EV Battery Pack Thermal Conductive Gel industry.

This Insight Report provides a comprehensive analysis of the global EV Battery Pack Thermal Conductive Gel 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 EV Battery Pack Thermal Conductive Gel portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global EV Battery Pack Thermal Conductive Gel market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for EV Battery Pack Thermal Conductive Gel and breaks down the forecast by Thermal Conductivity, 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 EV Battery Pack Thermal Conductive Gel.

This report presents a comprehensive overview, market shares, and growth opportunities of EV Battery Pack Thermal Conductive Gel market by product type, application, key manufacturers and key regions and countries.

Segmentation by Thermal Conductivity:

Below 2 W

2-4 W

4-6 W

Above 6 W

Segmentation by Material System:

Silicone-based Gel

Polyurethane-based Gel

Hybrid Polymer Gel

Others

Segmentation by Viscosity:

Low viscosity (500,000 cP)

Others

Segmentation by Application:

Battery Cell-to-Cold Plate Thermal Interface

Battery Module Gap Filling

Cell-to-Pack (CTP) Thermal Management

Cell-to-Chassis (CTC) Thermal Management

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.

Henkel AG & Co. KGaA

Dow Inc.

Shin-Etsu Chemical Co., Ltd.

Momentive Performance Materials

Wacker Chemie AG

Parker Hannifin Corporation

Laird Performance Materials

Fujipoly

Rogers Corporation

Shenzhen FRD Science & Technology

Suzhou Anjie Technology

Dongguan Betterly

LG Chem Ltd.

KCC Corporation

Eternal Materials Co., Ltd.

Huntsman Corporation

Indium Corporation

Master Bond Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global EV Battery Pack Thermal Conductive Gel market?

What factors are driving EV Battery Pack Thermal Conductive Gel market growth, globally and by region?

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

How do EV Battery Pack Thermal Conductive Gel market opportunities vary by end market size?

How does EV Battery Pack Thermal Conductive Gel break out by Thermal Conductivity, by Application?

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