

Global IC Packaging Thermal Paste Market Growth 2026-2032

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Abstracts

The global IC Packaging Thermal Paste market size is predicted to grow from US\$ 101 million in 2025 to US\$ 189 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

In 2025, global sales of IC Packaging Thermal Paste reached approximately 450 metric tons, with an average manufacturer-level selling price of about US\$230 per kilogram. Gross margins among major manufacturers were approximately 32%–45%.

IC Packaging Thermal Paste is a paste-form thermal interface material applied between the semiconductor die and the package lid, heat spreader, or direct-cooling structure. It fills microscopic surface irregularities and air gaps between the contacting surfaces, thereby forming a continuous, low-thermal-resistance heat-transfer path that enables heat generated by the chip to be transferred more efficiently to the package-level heat dissipation structure. Its primary functions are to reduce interfacial thermal resistance, mitigate localized hot spots, and limit junction-temperature rise, thereby improving chip operating stability, power-handling capability, and package reliability. The product is mainly used in TIM1 and certain TIM1.5 interfaces.

The upstream supply chain primarily includes base materials such as silicone oil, polysiloxane, and acrylic resin; thermally conductive fillers such as alumina, boron nitride, zinc oxide, silver powder, and carbon-based materials; and functional additives including coupling agents, dispersants, thixotropic agents, and curing agents. Filler particle-size distribution, dispersion uniformity, and impurity control directly affect product performance. Downstream applications mainly cover high-power IC packaging in data centers, consumer electronics, automotive electronics, telecommunication equipment, and industrial electronics. Material suppliers, semiconductor assembly and

test companies, chip manufacturers, and end-equipment manufacturers jointly conduct formulation validation, packaging-process qualification, and reliability certification.

United States market for IC Packaging Thermal Paste is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for IC Packaging Thermal Paste is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for IC Packaging Thermal Paste is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key IC Packaging Thermal Paste players cover Heraeus Electronics, Dow, Shin-Etsu Chemical, Momentive Performance Materials, NAMICS, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for IC Packaging Thermal Paste 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 IC Packaging Thermal Paste.

This report presents a comprehensive overview, market shares, and growth opportunities of IC Packaging Thermal Paste market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Silicone-based

Silicone-free

Segmentation by Electrical Property:

Electrically Insulating Type

Electrically Conductive Type

Segmentation by Thermal Conductivity:

Standard Thermal Conductivity Type (≤ 5 W/(m·K))

High Thermal Conductivity Type ($>5-10$ W/(m·K))

Ultra-high Thermal Conductivity Type (>10 W/(m·K))

Segmentation by Application:

Data Center

Consumer Electronics

Automotive Electronics

Telecommunication Equipment

Industrial Electronics

Other

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.

Heraeus Electronics

Dow

Shin-Etsu Chemical

Momentive Performance Materials

NAMICS

Parker Hannifin

Qnity Electronics

GTA Material

Darbond Technology

Key Questions Addressed in this Report

What is the 10-year outlook for the global IC Packaging Thermal Paste market?

What factors are driving IC Packaging Thermal Paste market growth, globally and by region?

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

How do IC Packaging Thermal Paste market opportunities vary by end market size?

How does IC Packaging Thermal Paste break out by Type, by Application?

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