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Global Integrated Heat Spreader (IHS) Market Growth 2026-2032

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Abstracts

The global Integrated Heat Spreader (IHS) market size is predicted to grow from US$ 747 million in 2025 to US$ 2166 million in 2032; it is expected to grow at a CAGR of 12.8% from 2026 to 2032.

An Integrated Heat Spreader (IHS) is the surface used to make contact between a heatsink or other thermal solution and a CPU or GPU processor.

Integrated Heat Spreader (IHS) - The metal “lid” of the CPU. This serves as a heat sink designed to distribute heat from the processor itself to a CPU cooler, as well as provide protection to the processor inside. This is the part of the CPU that is still exposed after being installed in a motherboard, and is the surface to which you apply thermal paste.

Integrated Heat Spreader (IHS) are one of the fundamental heat dissipation components used in various industries. They are typically made of high thermal conductivity metals such as copper or aluminum. In the electronics industry, heat spreaders or heat sinks are installed on electronic components or chips to transfer or dissipate the heat generated by the components using the thermal conductivity of the heat dissipation material itself. Heat spreaders find wide applications in the electronic information industry, semiconductor industry, and optoelectronic component industry, with downstream applications extending to the 3C industry.

Furthermore, electric vehicles (EVs) and hybrid electric vehicles (HEVs) have become a major trend in automotive development. In the inverters and rectifiers of electric vehicles, high-power chip modules pose thermal dissipation challenges. Currently, the mainstream solution for such designs is to use water-cooled heat spreaders. By utilizing highly thermally conductive metal materials, along with metal processing techniques

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and surface treatments, the chip temperature can be controlled within an acceptable range using water cooling. The thermal design of water-cooled heat spreaders needs to effectively dissipate the heat generated by the chips, while considering the cost and manufacturability aspects of the design for mass production.

Integrated Heat Spreader (IHS) can be segmented by material, size, geometry and surface treatment. Copper Heat Spreaders and Stainless Steel Heat Spreaders are the two principal categories. Copper remains the mainstream thermal material because of its high thermal conductivity; SHINKO, for example, specifies C1020 and C1100 copper, with electrolytic Ni or Ni plus selective Au plating, and supports outer dimensions of approximately 10–100 mm and thicknesses of 1.0–4.5 mm. Copper represented 79.94% of global heat-spreader revenue in 2025, versus 20.06% for stainless steel, while the shares are forecast to shift to 55.60% and 44.40%, respectively, by 2032. By size, products are divided into Large Size products of 35?35 mm and above and Small Size products below 35?35 mm; Large Size accounted for 54.65% of revenue in 2025 and is projected to reach 72.34% in 2032. Product geometries are simultaneously evolving from conventional flat lids toward cavity, multi-step, pedestal, ring and heterogeneous-integration structures, while manufacturing increasingly combines precision stamping, machining, forging, flattening and advanced surface treatment.

Global IC Package Heat Spreader demand is undergoing a fundamental transition from PC-oriented demand toward server, data-center and AI-chip packaging. PC CPU/GPU applications accounted for 67.68% of global revenue in 2021, compared with only 19.42% for Server/Data Center/AI Chip Packages. By 2025, the respective shares had converged to 46.22% and 44.22%, while in 2026E the Server/Data Center/AI Chip Package segment is estimated to rise sharply to 57.92%, compared with 34.58% for PC CPU/GPU. By 2032, the server/data-center/AI segment is forecast to reach 75.72% of global revenue. This transition is consistent with downstream fundamentals: TrendForce raised its 2026 AI-server shipment growth forecast to nearly 31% YoY, supported by strong investment in GPU clusters, proprietary AI ASICs and AI data-center infrastructure. Automotive SoC/FPGA remains smaller but structurally attractive because of ADAS, centralized computing and software-defined vehicles, while game consoles and conventional consumer applications are expected to account for a declining proportion of industry revenue.

The global Integrated Heat Spreader (IHS) market is highly concentrated, with competition increasingly centered on large-size precision processing, advanced customer qualification, vertical manufacturing integration and exposure to AI/HPC packages. Jentech Precision Industrial ranked first with a 51.58% global share, followed

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by Solstice Advanced Materials at 20.09%, SHINKO at 11.77% and I-Chiun at 6.86%, implying a combined CR4 of approximately 90.3%. Jentech's share increased from 30.27% in 2021 to more than 50% in 2024–2025, reflecting strong positioning in high-value CPU/GPU and AI/server heat spreaders. Solstice continues to include heat spreaders and thermal interface materials in its Electronic Materials portfolio and identifies CPU/GPU cooling and advanced packaging as key high-value applications. SHINKO retains integrated capabilities covering tooling, transfer stamping, machining and surface treatment. Meanwhile, Taiwan suppliers such as I-Chiun, Favor Precision and Niching benefit from proximity to the world's leading advanced-packaging ecosystem, while Chinese suppliers including Shandong Ruisi, HongRiDa and Ningbo S J are increasingly entering domestic CPU/GPU and AI-chip supply chains.

The industry is transitioning from a mature PC-oriented precision-metal component market into a higher-value semiconductor thermal-management segment closely linked to advanced packaging. Three structural changes are particularly evident. First, the product mix is rapidly shifting toward large-size heat spreaders: products of 35?35 mm and above increased from 36.41% of global revenue in 2021 to 54.65% in 2025 and are estimated at 61.47% in 2026E. Second, the application mix is rapidly shifting toward server/data-center/AI-chip packages, whose revenue share is estimated to rise from 19.42% in 2021 to 57.92% in 2026E. Third, production value is becoming increasingly concentrated in Taiwan: Taiwan's global production-value share increased from 43.03% in 2021 to 64.14% in 2025 and is estimated at 67.33% in 2026E. This is closely related to Taiwan's concentration of heat-spreader suppliers and advanced AI/HPC packaging capacity. TSMC states that 3.5-reticle-size CoWoS-L has been in production since 2024, 5.5-reticle-size CoWoS-L is scheduled to complete qualification in 2026, and development of a 9.5-reticle-size version is progressing.

The medium- to long-term growth of Integrated Heat Spreader (IHS) will be driven primarily by AI/HPC computing growth, advanced-package enlargement, increasing chip power density, heterogeneous integration, larger IHS dimensions and tighter thermal-mechanical specifications. AI GPUs and proprietary AI ASICs increasingly integrate multiple logic chiplets and HBM stacks, expanding package area and power consumption while increasing localized heat flux. This directly drives demand for larger, thicker and more structurally complex IHS products with tighter flatness, residual-stress and plating control. TSMC's roadmap toward 5.5-reticle and even 9.5-reticle CoWoS-L packages provides clear evidence of continued package enlargement. On the demand side, TrendForce's latest forecast of nearly 31% AI-server shipment growth in 2026 and continued expansion of hyperscaler AI infrastructure provide a strong structural catalyst. On the supply side, manufacturers are moving toward vertically integrated processing

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that combines precision stamping, forging, CNC machining, flattening/CMP, precision cleaning and advanced plating. As a result, future industry growth will increasingly come not only from higher unit shipments, but also from the rising revenue contribution of server/data-center/AI-chip packages, large-size products, more demanding materials and higher-value manufacturing processes.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Integrated Heat Spreader (IHS) 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 Integrated Heat Spreader (IHS) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Integrated Heat Spreader (IHS) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Integrated Heat Spreader (IHS) 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 Integrated Heat Spreader (IHS).

This report presents a comprehensive overview, market shares, and growth opportunities of Integrated Heat Spreader (IHS) market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

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Heat Spreader for FC (Flip Chip)

Heat Spreader for BGA

Segmentation By Size:

Large Size (35*35mm and Above)

Small Size (35*35mm Below)

Segmentation By Material:

Copper Heat Spreader

Stainless Steel Heat Spreader

Segmentation by Application:

PC CPU/GPU Package

Server/Data Center/AI Chip Package

Automotive SoC/FPGA Package

Gaming Console

Others

This report also splits the market by region:

Americas

United States

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- Canada
- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel

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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.

Shinko

Honeywell Advanced Materials

Jentech Precision Industrial

I-Chiun

Favor Precision Technology

Niching Industrial Corporation

Fastrong Technologies Corp.

ECE (Excel Cell Electronic)

Shandong Ruisi Precision Industry

HongRiDa Electronics (HRD)

TBT Co., Ltd

Ningbo S J Electronics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Integrated Heat Spreader (IHS)

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market?

What factors are driving Integrated Heat Spreader (IHS) market growth, globally and by region?

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

How do Integrated Heat Spreader (IHS) market opportunities vary by end market size?

How does Integrated Heat Spreader (IHS) break out by Type, by Application?

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