

Global Non-Silicone Gap Filler Market Growth 2026-2032

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Abstracts

The global Non-Silicone Gap Filler market size is predicted to grow from US\$ 605 million in 2025 to US\$ 1103 million in 2032; it is expected to grow at a CAGR of 8.9% from 2026 to 2032.

In 2025, global Non-Silicone Gap Filler production reached approximately 18,200 tons, with an average global market price of around 34/kg.

Non-Silicone Gap Filler is a thermally conductive interface material formulated without silicone-based polymers or silicone oils, designed to fill macroscopic gaps, surface irregularities and height tolerances between heat-generating components and heat sinks, cooling plates or device enclosures. It replaces thermally insulating air with a compliant heat-transfer medium, thereby reducing contact thermal resistance and improving heat dissipation while minimizing mechanical stress on sensitive components. Common binder systems include polyurethane, acrylic, epoxy, silane-modified polymer and other synthetic resins, combined with thermally conductive fillers such as alumina, aluminum nitride, boron nitride, magnesium oxide or graphite. Products are supplied as pads, sheets, putties, gels or one- and two-component dispensable compounds and are particularly suitable for optical devices, camera modules, relays, sensors, automotive electronics and other silicone-sensitive applications where siloxane volatilization, oil bleeding or electrical-contact contamination must be avoided.

The average single-line production capacity of Non-Silicone Gap Filler is 800 tons, the average gross profit margin was 33.4%.

The upstream sector supplies polyurethane, acrylic and other non-silicone resins, thermally conductive ceramic or carbon fillers, flame retardants, coupling agents,

backing films and packaging materials. Midstream manufacturers conduct formulation development, mixing, dispersion, coating, curing, sheet forming, die-cutting, filling and performance testing to produce gap-filler pads, gels, putties and dispensable compounds. Downstream demand comes mainly from consumer electronics, automotive electronics and EV batteries, telecommunications, data centers, optical equipment, industrial electronics, aerospace and energy-storage systems.

Raw materials account for approximately 55%–65% of total cost, including thermally conductive fillers at 30%–38%, non-silicone resins at 15%–20%, and additives, films and packaging at 8%–10%. Manufacturing labor represents about 8%–12%, equipment depreciation and energy 8%–10%, R&D and quality testing 7%–10%, and other factory, logistics and management expenses approximately 10%–15%.

Demand is being driven by rising power density in AI servers, EV batteries, energy-storage systems, optical modules and compact electronics, alongside stricter requirements for low outgassing, contamination control and automated dispensing. Business opportunities are strongest in high-thermal-conductivity materials, fast-dispensing two-component formulations, low-density EV battery products, ultra-low-outgassing optical grades and customized die-cut pads. Suppliers with proprietary resin formulations, filler-dispersion capabilities, automotive certification and stable mass-production quality are better positioned to secure high-value projects.

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

This Insight Report provides a comprehensive analysis of the global Non-Silicone Gap Filler 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 Non-Silicone Gap Filler portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Non-Silicone Gap Filler market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-Silicone Gap Filler and breaks down the forecast by

Product Form, 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 Non-Silicone Gap Filler.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-Silicone Gap Filler market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Form:

Gap Filler Pads

Dispensable Gap Fillers

Gap Filler Putties

Gap Filler Gels

Others

Segmentation by Binder Chemistry:

Polyurethane-Based

Acrylic-Based

Epoxy-Based

Silane-Modified Polymer-Based

Thermoplastic Elastomer-Based

Others

Segmentation by Thermal Conductivity:

Below 2 W/m·K

2–5 W/m·K

5–10 W/m·K

Above 10 W/m·K

Segmentation by Application:

Consumer Electronics

Automotive

Telecommunications Equipment

Optical and Imaging Equipment

Industrial Electronics

Aerospace and Defense

Medical Electronics

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

Parker Hannifin Corporation

Qnity Electronics, Inc. (Laird Performance Materials)

DuPont

H.B. Fuller Company

Element Solutions Inc.

AOS Thermal Compounds

T-Global Technology Co., Ltd.

Timtronics

KERAFOL Keramische Folien GmbH & Co. KG

GLPOLY Thermal Management

Dongguan Ziitek Electronic Material and Technology Ltd.

Shiu Li Technology Co., Ltd. (LiPOLY)

Sanyo Chemical Industries, Ltd.

Dainichiseika Color & Chemicals Mfg. Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-Silicone Gap Filler market?

What factors are driving Non-Silicone Gap Filler market growth, globally and by region?

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

How do Non-Silicone Gap Filler market opportunities vary by end market size?

How does Non-Silicone Gap Filler break out by Product Form, by Application?

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