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# Global Thermally Conductive Adhesive Tape for Electronics Market Growth 2026-2032

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## Abstracts

The global Thermally Conductive Adhesive Tape for Electronics market size is predicted to grow from US$ 685 million in 2025 to US$ 1074 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

Thermally Conductive Adhesive Tape for Electronics is a pressure-sensitive thermal interface material designed to provide both mechanical bonding and preferential heat transfer between heat-generating electronic components and cooling structures. The product typically consists of acrylic-, silicone-, or other pressure-sensitive adhesive systems containing thermally conductive functional fillers and may be supplied as substrate-free adhesive transfer tape or as carrier-based double-sided tape using PET, polyimide, or other thin supporting films. Its primary thermal-management function is through-thickness or Z-axis heat transfer across the bonded interface, while additional properties may include electrical insulation, flame retardancy, halogen-free formulation, dimensional stability, conformability, and die-cut processability. Commercial products span low to high thermal-conductivity grades and different bond-line thicknesses to balance thermal impedance, adhesion, dielectric performance, and assembly requirements. Thermally Conductive Adhesive Tape for Electronics is supplied in rolls, industrial sheets, or manufacturer-prepared die-cut formats and is used in consumer electronics, automotive electronics, communication and data-center equipment, LED assemblies, industrial and power electronics, and semiconductor-related component assembly.

## Key Findings

Acrylic pressure-sensitive adhesive architectures remain widely used across transfer and carrier-based thermally conductive tape portfolios

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Z-axis thermal transfer, bond-line thickness, adhesion and dielectric performance are the principal technical differentiators of electronic thermal tapes

Consumer electronics remains a core demand base while EV electronics and data-center hardware are expanding higher-performance thermal-management requirements

3M, Nitto, Henkel, Parker and tesa form part of the established global supplier base for thermally conductive adhesive tapes

Qnity became an independent publicly traded electronics-materials company in November 2025 and continues to commercialize Temprion AT adhesive thermal tape

## Market Trends

Thermally Conductive Adhesive Tape for Electronics is developing toward thinner bond lines, higher through-thickness thermal performance, stronger bonding reliability and greater integration of electrical insulation, flame-retardant and processing functions. Traditional products were primarily positioned as convenient alternatives to screws, clips and other mechanical heat-sink fastening methods, but newer electronic designs increasingly require the tape itself to contribute simultaneously to thermal transfer, mechanical fixation, dielectric isolation and automated assembly. 3M continues to offer thin halogen-free transfer-tape architectures, Parker provides THERMATTACH products combining thermal, dielectric and flame-retardant configurations, and tesa has broadened thermal-tape positioning into battery systems, smartphones, servers and data-center hardware. The application mix is also shifting toward higher power density. AI servers, communication infrastructure, EV power electronics and increasingly compact consumer devices create stronger requirements for controlled interface thermal resistance and reliable bonding under thermal cycling. At the same time, manufacturers are improving coating precision, filler dispersion, thinner constructions and die-cut compatibility so that tapes can be integrated into automated electronic-assembly processes rather than treated simply as secondary mounting materials.

## Market Dynamics

### Drivers

### Drivers

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The central market driver is rising heat density in electronic systems as semiconductor performance increases while product size and available cooling space remain constrained. Higher-power processors, power semiconductors, communication modules, automotive electronics and LED assemblies require efficient heat paths between devices and heat sinks without adding bulky mechanical fixtures. Thermally conductive adhesive tapes address this requirement by combining heat transfer and bonding in a single thin material, simplifying assembly and eliminating separate screws, clips or cure processes in suitable applications. 3M positions its transfer tapes as preferential heat-transfer paths between heat-generating components and cooling devices, while Parker highlights the ability of THERMATTACH tapes to bond heat sinks directly to power-dissipating components. Growth in EV electronics and data-center equipment adds another demand layer. tesa currently positions thermal tapes for EV battery-module thermal management and server heat dissipation, reflecting the expansion of adhesive TIM solutions beyond traditional consumer-electronics applications.

## Restraints

The principal restraint is that adhesive tape is not the optimal thermal interface material for every geometry or heat-load condition. Tape performs best where the mating surfaces are comparatively flat and the bond-line gap is controlled; applications with large gaps, substantial surface unevenness or very high thermal loads may instead use conformable gap pads, gels, greases, phase-change materials or liquid thermal adhesives. Parker, for example, maintains these products as separate TIM categories, illustrating that thermally conductive tape competes within a broader thermal-interface portfolio rather than replacing every alternative material. A further constraint is the engineering trade-off among thermal conductivity, adhesive strength, thickness, conformability and electrical insulation. Increasing filler loading can improve thermal transport but can also alter rheology, wet-out and mechanical behavior, while thinner constructions demand tighter coating tolerances and cleaner substrate surfaces. Qualification cycles in automotive, semiconductor and data-center applications can also be lengthy because adhesion and thermal resistance must remain stable through temperature cycling, vibration and long-term operating exposure.

## Opportunities

High-growth technical opportunities are concentrated in power-dense electronic architectures where mounting space is limited and manufacturers seek simpler automated assembly. EV power modules, battery-management electronics, ADAS modules, AI servers, communication infrastructure, high-performance processors and

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compact consumer devices create opportunities for thin thermally conductive adhesive systems that combine heat transfer with dielectric isolation and reliable fixation. tesa explicitly positions thermal tapes in EV battery modules and server/data-center systems, while 3M offers application-specific thermally conductive tape guidance for communications infrastructure. Semiconductor and advanced-computing applications also provide opportunities for specialized low-thermal-impedance products. Qnity's Temprion AT is designed to provide conformable adhesive thermal contact at relatively low assembly pressures, indicating a market direction toward materials capable of supporting sensitive, complex circuitry while maintaining thermal performance. Additional value can be created through halogen-free, flame-retardant, electrically insulating and precision die-cut grades that reduce the number of separate materials required in electronic assembly.

### Challenges

The main industry challenge is maintaining simultaneous excellence in thermal transfer and pressure-sensitive adhesion. A material with high bulk thermal conductivity does not automatically deliver low interface thermal resistance if it cannot wet the substrate effectively, while very soft or highly adhesive formulations may create handling, dimensional-stability or rework limitations. Manufacturers therefore need to control conductive filler type and loading, adhesive chemistry, coating thickness, carrier design and surface compatibility as an integrated material system. Product qualification is increasingly demanding because electronic tapes can be exposed to temperature cycling, vibration, high humidity and long service lives, particularly in automotive and infrastructure electronics. Another challenge is the growing diversity of customer specifications: consumer electronics favor ultra-thin constructions, power electronics may prioritize dielectric strength and temperature stability, while automotive and data-center applications require long-term reliability and sometimes flame-retardant performance. This fragmentation increases formulation, testing and inventory complexity even though the underlying product remains a thin adhesive TIM.

## Industry Chain Analysis

The upstream industry chain for Thermally Conductive Adhesive Tape for Electronics includes acrylic and silicone pressure-sensitive adhesive polymers, thermally conductive ceramic or mineral fillers, PET and polyimide carrier films, release liners, flame-retardant additives and other functional coating materials. The thermal and mechanical properties of the final product depend heavily on filler dispersion, polymer formulation, interface compatibility and coating uniformity. Parker describes

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THERMATTACH tapes as acrylic- or silicone-based pressure-sensitive adhesives loaded with thermally conductive fillers, while Nitto's TR-5310EX demonstrates a carrier-supported architecture combining thermally conductive adhesive with polyester film. Midstream manufacturers conduct adhesive formulation, filler mixing and dispersion, precision coating, lamination, curing or drying, slitting, quality control and, in some cases, precision die-cutting. Value creation is concentrated in proprietary adhesive chemistry, conductive-filler technology, control of bond-line thickness, dielectric and flame-retardant design, coating yield, reliability validation and ability to process very thin materials at industrial scale.

Downstream, the material is purchased by electronic component manufacturers, thermal-module suppliers, converters and OEM/ODM assemblers for integration between heat-generating components and heat sinks, cooling plates, heat spreaders or related structures. Consumer devices, automotive electronics, communications equipment, servers, LED assemblies, power electronics and semiconductor packages form the major application groups. Specialist converters can transform roll stock into highly precise die-cut geometries for automated placement, but this conversion stage should remain statistically separate from the manufacturing value of the original adhesive tape to prevent double counting. Parker's commercial portfolio explicitly supports custom die-cut configurations, illustrating the importance of converting compatibility within the downstream supply chain.

## Segment Insights

By structure, substrate-free thermally conductive adhesive transfer tape is particularly attractive where designers require very thin bond lines, minimal thermal-interface thickness and conformability, while carrier-based double-sided tape provides dimensional stability and easier handling during converting and assembly. 3M's 8800 series represents the transfer-tape architecture, whereas Nitto's TR-5310EX portfolio includes PET-supported constructions and also demonstrates that carrier choice affects processability. The market therefore does not divide simply by adhesive chemistry; product construction determines handling, thickness control, thermal impedance and suitability for precision die-cutting.

By thermal-conductivity level, low- and medium-conductivity products remain suitable for many conventional component-to-heat-sink mounting applications where adhesion, dielectric performance and cost are equally important. Higher-conductivity grades occupy a more performance-sensitive value segment as heat flux rises in power devices, processors and advanced electronics. Adhesive chemistry introduces another

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structural distinction: acrylic PSA systems are widely commercialized because of strong bonding, processability and broad substrate compatibility, while silicone-based thermal tapes provide advantages where temperature stability and silicone material properties are required. Parker explicitly offers acrylic- and silicone-based PSA formulations, and Shin-Etsu maintains double-sided silicone thermal interface tapes for power-transistor and substrate heat dissipation.

## Downstream Market Opportunities

Consumer electronics remains an important volume application because smartphones, tablets, displays, processors and other compact devices combine increasingly concentrated heat generation with strict thickness constraints. Automotive electronics provides a higher-reliability opportunity through ECUs, power modules, ADAS electronics and battery-related systems, where thermal transfer must coexist with electrical insulation and long service life. Communications infrastructure and data centers are becoming more strategically important as high-performance servers, networking equipment and AI computing hardware increase cooling requirements; tesa now explicitly promotes thermal conductive tapes for server and data-center applications, while 3M provides dedicated thermal-tape resources for communications infrastructure. LED assemblies, industrial power electronics and semiconductor-related packaging remain additional attractive applications because adhesive TIMs can replace mechanical fasteners and simplify automated production when interface gaps are sufficiently controlled.

## Regional Insights

Asia-Pacific represents a central manufacturing and consumption region for Thermally Conductive Adhesive Tape for Electronics because a substantial portion of global consumer electronics, semiconductor, LED, communication-equipment and electronic-component manufacturing is concentrated across Japan, China, South Korea, Taiwan and Southeast Asia. Japan has established materials suppliers such as Nitto Denko and Shin-Etsu Chemical with commercial thermal interface tape technologies, while China and Taiwan have developed specialized electronic thermal-management tape producers serving regional electronics supply chains. Nitto’s TR-5310EX and Shin-Etsu’s TC-SAS series illustrate the region’s long-standing product capabilities in carrier-based acrylic and silicone thermal-interface tapes.

North America maintains a strong supplier and high-value application base through 3M, Parker, Avery Dennison, Boyd, Saint-Gobain Performance Plastics, Mativ, Shurtape

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and Qnity, with demand increasingly linked to advanced computing, communications infrastructure, automotive electronics and industrial power systems. Europe has a concentrated specialty-adhesive technology base led by companies such as Henkel, tesa and Lohmann and benefits from strong automotive and industrial-electronics demand. Current application development in both North America and Europe increasingly emphasizes EV systems and server/data-center thermal management rather than only conventional consumer electronics.

## Competitive Landscape Analysis

The competitive landscape of Thermally Conductive Adhesive Tape for Electronics combines diversified global materials groups with specialized thermal-interface and adhesive-tape manufacturers. 3M maintains a broad portfolio spanning adhesive transfer tapes and conformable thermally conductive interface tapes and competes through thin constructions, thermal-transfer performance, halogen-free options and broad electronics application coverage. Nitto Denko combines thermally conductive adhesive technology with established industrial-tape manufacturing and carrier-based processing expertise, while Henkel’s BERGQUIST BOND PLY family integrates thermal transfer, electrical insulation and pressure-sensitive bonding. Parker Chomerics differentiates through the THERMATTACH portfolio, including acrylic and silicone PSA chemistries, dielectric and flame-retardant configurations and custom die-cut formats. tesa increasingly positions its thermal tapes across consumer devices, EV batteries and server/data-center applications, while Shin-Etsu contributes silicone-based thermal-interface tape technology. Avery Dennison, Lohmann, Boyd, Saint-Gobain Performance Plastics, Mativ/Scapa, T-Global Technology, SHIU LI TECHNOLOGY, Anhui Fuyin and Shurtape provide additional global or regional competition across specialized electronic and thermal-management applications. A notable recent structural change occurred in November 2025, when Qnity Electronics became an independent publicly traded company following its separation from DuPont; Qnity continues to commercialize Temprion AT adhesive thermal tape as part of its electronics-materials portfolio. Competition is therefore increasingly determined by thermal impedance rather than nominal conductivity alone, together with adhesion reliability, dielectric performance, flame retardancy, material thickness, die-cutting capability, automated-placement compatibility and the ability to qualify products within global electronics and automotive supply chains.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Thermally Conductive Adhesive

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Tape for Electronics Industry Forecast" looks at past sales and reviews total world Thermally Conductive Adhesive Tape for Electronics sales in 2025, providing a comprehensive analysis by region and market sector of projected Thermally Conductive Adhesive Tape for Electronics sales for 2026 through 2032. With Thermally Conductive Adhesive Tape for Electronics sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Thermally Conductive Adhesive Tape for Electronics industry.

This Insight Report provides a comprehensive analysis of the global Thermally Conductive Adhesive Tape for Electronics 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 Thermally Conductive Adhesive Tape for Electronics portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thermally Conductive Adhesive Tape for Electronics market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thermally Conductive Adhesive Tape for Electronics and breaks down the forecast by Carrier Structure Types, 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 Thermally Conductive Adhesive Tape for Electronics.

This report presents a comprehensive overview, market shares, and growth opportunities of Thermally Conductive Adhesive Tape for Electronics market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Carrier Structure Types:

Carrier-Based Thermally Conductive Adhesive Tape

Substrate-Free Thermally Conductive Adhesive Transfer Tape

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## Segmentation by Z-Axis Thermal Conductivity Types:

Low Thermal Conductivity (<0.5 W/m·K)

Medium Thermal Conductivity (0.5–1.5 W/m·K)

High Thermal Conductivity (>1.5 W/m·K)

## Segmentation by Pressure-Sensitive Adhesive Types:

Acrylic-Based Thermally Conductive Adhesive Tape

Silicone-Based Thermally Conductive Adhesive Tape

## Segmentation by Application:

Consumer Electronics Thermal Management (Processors, Displays, and Mobile Devices)

Automotive Electronics Thermal Management (ECUs, Power Modules, and Infotainment Systems)

Communications and Data Center Electronics (Base Stations, Servers, and Network Equipment)

LED Lighting Thermal Management (LED Boards and Heat Sinks)

Industrial and Power Electronics (PCBs, Power Devices, and Control Modules)

Semiconductor Packaging and Component Assembly

Others

## This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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.

3M Company

Nitto Denko Corporation

Henkel AG & Co. KGaA

Parker-Hannifin Corporation

tesa SE

Qnity Electronics, Inc.

Shin-Etsu Chemical Co., Ltd.

Avery Dennison Corporation

Lohmann GmbH & Co. KG

Boyd Corporation

Saint-Gobain Performance Plastics Corporation

T-Global Technology Limited

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Anhui Fuyin New Materials Co., Ltd.

Shurtape Technologies, LLC

Crown

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Thermally Conductive Adhesive Tape for Electronics market?

What factors are driving Thermally Conductive Adhesive Tape for Electronics market growth, globally and by region?

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

How do Thermally Conductive Adhesive Tape for Electronics market opportunities vary by end market size?

How does Thermally Conductive Adhesive Tape for Electronics break out by Carrier Structure Types, by Application?

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# Contents

## 1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

## 2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Thermally Conductive Adhesive Tape for Electronics Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Thermally Conductive Adhesive Tape for Electronics by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Thermally Conductive Adhesive Tape for Electronics by Country/Region, 2021, 2025 & 2032
2.2 Thermally Conductive Adhesive Tape for Electronics Segment by Carrier Structure Types
  2.2.1 Carrier-Based Thermally Conductive Adhesive Tape
  2.2.2 Substrate-Free Thermally Conductive Adhesive Transfer Tape
  2.2.3 Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types
    2.2.3.1 Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
    2.2.3.2 Global Thermally Conductive Adhesive Tape for Electronics Revenue and Market Share by Carrier Structure Types (2021-2026)
    2.2.3.3 Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Carrier Structure Types (2021-2026)
2.3 Thermally Conductive Adhesive Tape for Electronics Segment by Z-Axis Thermal Conductivity Types
  2.3.1 Low Thermal Conductivity (<0.5 W/m·K)
  2.3.2 Medium Thermal Conductivity (0.5–1.5 W/m·K)
  2.3.3 High Thermal Conductivity (>1.5 W/m·K)

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2.3.4 Thermally Conductive Adhesive Tape for Electronics Sales by Z-Axis Thermal Conductivity Types
2.3.4.1 Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Z-Axis Thermal Conductivity Types (2021-2026)
2.3.4.2 Global Thermally Conductive Adhesive Tape for Electronics Revenue and Market Share by Z-Axis Thermal Conductivity Types (2021-2026)
2.3.4.3 Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Z-Axis Thermal Conductivity Types (2021-2026)
2.4 Thermally Conductive Adhesive Tape for Electronics Segment by Pressure-Sensitive Adhesive Types
2.4.1 Acrylic-Based Thermally Conductive Adhesive Tape
2.4.2 Silicone-Based Thermally Conductive Adhesive Tape
2.4.3 Thermally Conductive Adhesive Tape for Electronics Sales by Pressure-Sensitive Adhesive Types
2.4.3.1 Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Pressure-Sensitive Adhesive Types (2021-2026)
2.4.3.2 Global Thermally Conductive Adhesive Tape for Electronics Revenue and Market Share by Pressure-Sensitive Adhesive Types (2021-2026)
2.4.3.3 Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Pressure-Sensitive Adhesive Types (2021-2026)
2.5 Thermally Conductive Adhesive Tape for Electronics Segment by Application
2.5.1 Consumer Electronics Thermal Management (Processors, Displays, and Mobile Devices)
2.5.2 Automotive Electronics Thermal Management (ECUs, Power Modules, and Infotainment Systems)
2.5.3 Communications and Data Center Electronics (Base Stations, Servers, and Network Equipment)
2.5.4 LED Lighting Thermal Management (LED Boards and Heat Sinks)
2.5.5 Industrial and Power Electronics (PCBs, Power Devices, and Control Modules)
2.5.6 Semiconductor Packaging and Component Assembly
2.5.7 Others
2.5.8 Thermally Conductive Adhesive Tape for Electronics Sales by Application
2.5.8.1 Global Thermally Conductive Adhesive Tape for Electronics Sale Market Share by Application (2021-2026)
2.5.8.2 Global Thermally Conductive Adhesive Tape for Electronics Revenue and Market Share by Application (2021-2026)
2.5.8.3 Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Application (2021-2026)

+357 96 030922
info@marketpublishers.com

## 3 GLOBAL BY COMPANY

3.1 Global Thermally Conductive Adhesive Tape for Electronics Breakdown Data by Company
3.1.1 Global Thermally Conductive Adhesive Tape for Electronics Annual Sales by Company (2021-2026)
3.1.2 Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Company (2021-2026)
3.2 Global Thermally Conductive Adhesive Tape for Electronics Annual Revenue by Company (2021-2026)
3.2.1 Global Thermally Conductive Adhesive Tape for Electronics Revenue by Company (2021-2026)
3.2.2 Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Company (2021-2026)
3.3 Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Company
3.4 Key Manufacturers Thermally Conductive Adhesive Tape for Electronics Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Thermally Conductive Adhesive Tape for Electronics Product Location Distribution
3.4.2 Players Thermally Conductive Adhesive Tape for Electronics Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

## 4 WORLD HISTORIC REVIEW FOR THERMALLY CONDUCTIVE ADHESIVE TAPE FOR ELECTRONICS BY GEOGRAPHIC REGION

4.1 World Historic Thermally Conductive Adhesive Tape for Electronics Market Size by Geographic Region (2021-2026)
4.1.1 Global Thermally Conductive Adhesive Tape for Electronics Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Thermally Conductive Adhesive Tape for Electronics Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Thermally Conductive Adhesive Tape for Electronics Market Size by Country/Region (2021-2026)
4.2.1 Global Thermally Conductive Adhesive Tape for Electronics Annual Sales by Country/Region (2021-2026)

+357 96 030922
info@marketpublishers.com

4.2.2 Global Thermally Conductive Adhesive Tape for Electronics Annual Revenue by Country/Region (2021-2026)
4.3 Americas Thermally Conductive Adhesive Tape for Electronics Sales Growth
4.4 APAC Thermally Conductive Adhesive Tape for Electronics Sales Growth
4.5 Europe Thermally Conductive Adhesive Tape for Electronics Sales Growth
4.6 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales Growth

**5 AMERICAS**

5.1 Americas Thermally Conductive Adhesive Tape for Electronics Sales by Country
5.1.1 Americas Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026)
5.1.2 Americas Thermally Conductive Adhesive Tape for Electronics Revenue by Country (2021-2026)
5.2 Americas Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026)
5.3 Americas Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

**6 APAC**

6.1 APAC Thermally Conductive Adhesive Tape for Electronics Sales by Region
6.1.1 APAC Thermally Conductive Adhesive Tape for Electronics Sales by Region (2021-2026)
6.1.2 APAC Thermally Conductive Adhesive Tape for Electronics Revenue by Region (2021-2026)
6.2 APAC Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026)
6.3 APAC Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia

+357 96 030922
info@marketpublishers.com

6.8 India
6.9 Australia
6.10 China Taiwan

**7 EUROPE**

7.1 Europe Thermally Conductive Adhesive Tape for Electronics by Country
7.1.1 Europe Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026)
7.1.2 Europe Thermally Conductive Adhesive Tape for Electronics Revenue by Country (2021-2026)
7.2 Europe Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026)
7.3 Europe Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

**8 MIDDLE EAST & AFRICA**

8.1 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics by Country
8.1.1 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026)
8.1.2 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Revenue by Country (2021-2026)
8.2 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026)
8.3 Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

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info@marketpublishers.com

## 9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

## 10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Thermally Conductive Adhesive Tape for Electronics
10.3 Manufacturing Process Analysis of Thermally Conductive Adhesive Tape for Electronics
10.4 Industry Chain Structure of Thermally Conductive Adhesive Tape for Electronics

## 11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Thermally Conductive Adhesive Tape for Electronics Distributors
11.3 Thermally Conductive Adhesive Tape for Electronics Customer

## 12 WORLD FORECAST REVIEW FOR THERMALLY CONDUCTIVE ADHESIVE TAPE FOR ELECTRONICS BY GEOGRAPHIC REGION

12.1 Global Thermally Conductive Adhesive Tape for Electronics Market Size Forecast by Region
  12.1.1 Global Thermally Conductive Adhesive Tape for Electronics Forecast by Region (2027-2032)
  12.1.2 Global Thermally Conductive Adhesive Tape for Electronics Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Thermally Conductive Adhesive Tape for Electronics Forecast by Carrier Structure Types (2027-2032)
12.7 Global Thermally Conductive Adhesive Tape for Electronics Forecast by

+357 96 030922
info@marketpublishers.com

Application (2027-2032)

## 13 KEY PLAYERS ANALYSIS

13.1 3M Company
13.1.1 3M Company Company Information
13.1.2 3M Company Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.1.3 3M Company Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 3M Company Main Business Overview
13.1.5 3M Company Latest Developments
13.2 Nitto Denko Corporation
13.2.1 Nitto Denko Corporation Company Information
13.2.2 Nitto Denko Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.2.3 Nitto Denko Corporation Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Nitto Denko Corporation Main Business Overview
13.2.5 Nitto Denko Corporation Latest Developments
13.3 Henkel AG & Co. KGaA
13.3.1 Henkel AG & Co. KGaA Company Information
13.3.2 Henkel AG & Co. KGaA Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.3.3 Henkel AG & Co. KGaA Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Henkel AG & Co. KGaA Main Business Overview
13.3.5 Henkel AG & Co. KGaA Latest Developments
13.4 Parker-Hannifin Corporation
13.4.1 Parker-Hannifin Corporation Company Information
13.4.2 Parker-Hannifin Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.4.3 Parker-Hannifin Corporation Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Parker-Hannifin Corporation Main Business Overview
13.4.5 Parker-Hannifin Corporation Latest Developments
13.5 tesa SE
13.5.1 tesa SE Company Information
13.5.2 tesa SE Thermally Conductive Adhesive Tape for Electronics Product Portfolios

+357 96 030922
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and Specifications
13.5.3 tesa SE Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 tesa SE Main Business Overview
13.5.5 tesa SE Latest Developments
13.6 Qnity Electronics, Inc.
13.6.1 Qnity Electronics, Inc. Company Information
13.6.2 Qnity Electronics, Inc. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.6.3 Qnity Electronics, Inc. Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Qnity Electronics, Inc. Main Business Overview
13.6.5 Qnity Electronics, Inc. Latest Developments
13.7 Shin-Etsu Chemical Co., Ltd.
13.7.1 Shin-Etsu Chemical Co., Ltd. Company Information
13.7.2 Shin-Etsu Chemical Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.7.3 Shin-Etsu Chemical Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Shin-Etsu Chemical Co., Ltd. Main Business Overview
13.7.5 Shin-Etsu Chemical Co., Ltd. Latest Developments
13.8 Avery Dennison Corporation
13.8.1 Avery Dennison Corporation Company Information
13.8.2 Avery Dennison Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.8.3 Avery Dennison Corporation Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Avery Dennison Corporation Main Business Overview
13.8.5 Avery Dennison Corporation Latest Developments
13.9 Lohmann GmbH & Co. KG
13.9.1 Lohmann GmbH & Co. KG Company Information
13.9.2 Lohmann GmbH & Co. KG Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.9.3 Lohmann GmbH & Co. KG Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Lohmann GmbH & Co. KG Main Business Overview
13.9.5 Lohmann GmbH & Co. KG Latest Developments
13.10 Boyd Corporation
13.10.1 Boyd Corporation Company Information

+357 96 030922
info@marketpublishers.com

13.10.2 Boyd Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.10.3 Boyd Corporation Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Boyd Corporation Main Business Overview
13.10.5 Boyd Corporation Latest Developments
13.11 Saint-Gobain Performance Plastics Corporation
13.11.1 Saint-Gobain Performance Plastics Corporation Company Information
13.11.2 Saint-Gobain Performance Plastics Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.11.3 Saint-Gobain Performance Plastics Corporation Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Saint-Gobain Performance Plastics Corporation Main Business Overview
13.11.5 Saint-Gobain Performance Plastics Corporation Latest Developments
13.12 T-Global Technology Limited
13.12.1 T-Global Technology Limited Company Information
13.12.2 T-Global Technology Limited Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.12.3 T-Global Technology Limited Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 T-Global Technology Limited Main Business Overview
13.12.5 T-Global Technology Limited Latest Developments
13.13 SHIU LI TECHNOLOGY CO., LTD.
13.13.1 SHIU LI TECHNOLOGY CO., LTD. Company Information
13.13.2 SHIU LI TECHNOLOGY CO., LTD. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.13.3 SHIU LI TECHNOLOGY CO., LTD. Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 SHIU LI TECHNOLOGY CO., LTD. Main Business Overview
13.13.5 SHIU LI TECHNOLOGY CO., LTD. Latest Developments
13.14 Anhui Fuyin New Materials Co., Ltd.
13.14.1 Anhui Fuyin New Materials Co., Ltd. Company Information
13.14.2 Anhui Fuyin New Materials Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.14.3 Anhui Fuyin New Materials Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Anhui Fuyin New Materials Co., Ltd. Main Business Overview
13.14.5 Anhui Fuyin New Materials Co., Ltd. Latest Developments
13.15 Shurtape Technologies, LLC

+357 96 030922
info@marketpublishers.com

13.15.1 Shurtape Technologies, LLC Company Information
13.15.2 Shurtape Technologies, LLC Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.15.3 Shurtape Technologies, LLC Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Shurtape Technologies, LLC Main Business Overview
13.15.5 Shurtape Technologies, LLC Latest Developments
13.16 Crown
13.16.1 Crown Company Information
13.16.2 Crown Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
13.16.3 Crown Thermally Conductive Adhesive Tape for Electronics Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Crown Main Business Overview
13.16.5 Crown Latest Developments

**14 RESEARCH FINDINGS AND CONCLUSION**

+357 96 030922
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# List Of Tables

## LIST OF TABLES

Table 1. Thermally Conductive Adhesive Tape for Electronics Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Thermally Conductive Adhesive Tape for Electronics Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Carrier-Based Thermally Conductive Adhesive Tape
Table 4. Major Players of Substrate-Free Thermally Conductive Adhesive Transfer Tape
Table 5. Global Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026) & (K Sqm)
Table 6. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
Table 7. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Carrier Structure Types (2021-2026) & ($ million)
Table 8. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Carrier Structure Types (2021-2026)
Table 9. Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Carrier Structure Types (2021-2026) & (US$/Sq m)
Table 10. Major Players of Low Thermal Conductivity (<0.5 W/m·K)
Table 11. Major Players of Medium Thermal Conductivity (0.5–1.5 W/m·K)
Table 12. Major Players of High Thermal Conductivity (>1.5 W/m·K)
Table 13. Global Thermally Conductive Adhesive Tape for Electronics Sales by Z-Axis Thermal Conductivity Types (2021-2026) & (K Sqm)
Table 14. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Z-Axis Thermal Conductivity Types (2021-2026)
Table 15. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Z-Axis Thermal Conductivity Types (2021-2026) & ($ million)
Table 16. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Z-Axis Thermal Conductivity Types (2021-2026)
Table 17. Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Z-Axis Thermal Conductivity Types (2021-2026) & (US$/Sq m)
Table 18. Major Players of Acrylic-Based Thermally Conductive Adhesive Tape
Table 19. Major Players of Silicone-Based Thermally Conductive Adhesive Tape
Table 20. Global Thermally Conductive Adhesive Tape for Electronics Sales by Pressure-Sensitive Adhesive Types (2021-2026) & (K Sqm)
Table 21. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Pressure-Sensitive Adhesive Types (2021-2026)

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Table 22. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Pressure-Sensitive Adhesive Types (2021-2026) & ($ million)
Table 23. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Pressure-Sensitive Adhesive Types (2021-2026)
Table 24. Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Pressure-Sensitive Adhesive Types (2021-2026) & (US$/Sq m)
Table 25. Global Thermally Conductive Adhesive Tape for Electronics Sale by Application (2021-2026) & (K Sqm)
Table 26. Global Thermally Conductive Adhesive Tape for Electronics Sale Market Share by Application (2021-2026)
Table 27. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Application (2021-2026) & ($ million)
Table 28. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Application (2021-2026)
Table 29. Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Application (2021-2026) & (US$/Sq m)
Table 30. Global Thermally Conductive Adhesive Tape for Electronics Sales by Company (2021-2026) & (K Sqm)
Table 31. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Company (2021-2026)
Table 32. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Company (2021-2026) & ($ millions)
Table 33. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Company (2021-2026)
Table 34. Global Thermally Conductive Adhesive Tape for Electronics Sale Price by Company (2021-2026) & (US$/Sq m)
Table 35. Key Manufacturers Thermally Conductive Adhesive Tape for Electronics Producing Area Distribution and Sales Area
Table 36. Players Thermally Conductive Adhesive Tape for Electronics Products Offered
Table 37. Thermally Conductive Adhesive Tape for Electronics Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 38. New Products and Potential Entrants
Table 39. Market M&A Activity & Strategy
Table 40. Global Thermally Conductive Adhesive Tape for Electronics Sales by Geographic Region (2021-2026) & (K Sqm)
Table 41. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share Geographic Region (2021-2026)
Table 42. Global Thermally Conductive Adhesive Tape for Electronics Revenue by

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Geographic Region (2021-2026) & ($ millions)
Table 43. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Geographic Region (2021-2026)
Table 44. Global Thermally Conductive Adhesive Tape for Electronics Sales by Country/Region (2021-2026) & (K Sqm)
Table 45. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country/Region (2021-2026)
Table 46. Global Thermally Conductive Adhesive Tape for Electronics Revenue by Country/Region (2021-2026) & ($ millions)
Table 47. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Country/Region (2021-2026)
Table 48. Americas Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026) & (K Sqm)
Table 49. Americas Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country (2021-2026)
Table 50. Americas Thermally Conductive Adhesive Tape for Electronics Revenue by Country (2021-2026) & ($ millions)
Table 51. Americas Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026) & (K Sqm)
Table 52. Americas Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026) & (K Sqm)
Table 53. APAC Thermally Conductive Adhesive Tape for Electronics Sales by Region (2021-2026) & (K Sqm)
Table 54. APAC Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Region (2021-2026)
Table 55. APAC Thermally Conductive Adhesive Tape for Electronics Revenue by Region (2021-2026) & ($ millions)
Table 56. APAC Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026) & (K Sqm)
Table 57. APAC Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026) & (K Sqm)
Table 58. Europe Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026) & (K Sqm)
Table 59. Europe Thermally Conductive Adhesive Tape for Electronics Revenue by Country (2021-2026) & ($ millions)
Table 60. Europe Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026) & (K Sqm)
Table 61. Europe Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026) & (K Sqm)

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Table 62. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Country (2021-2026) & (K Sqm)
Table 63. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Country (2021-2026)
Table 64. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Carrier Structure Types (2021-2026) & (K Sqm)
Table 65. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales by Application (2021-2026) & (K Sqm)
Table 66. Key Market Drivers & Growth Opportunities of Thermally Conductive Adhesive Tape for Electronics
Table 67. Key Market Challenges & Risks of Thermally Conductive Adhesive Tape for Electronics
Table 68. Key Industry Trends of Thermally Conductive Adhesive Tape for Electronics
Table 69. Thermally Conductive Adhesive Tape for Electronics Raw Material
Table 70. Key Suppliers of Raw Materials
Table 71. Thermally Conductive Adhesive Tape for Electronics Distributors List
Table 72. Thermally Conductive Adhesive Tape for Electronics Customer List
Table 73. Global Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Region (2027-2032) & (K Sqm)
Table 74. Global Thermally Conductive Adhesive Tape for Electronics Revenue Forecast by Region (2027-2032) & ($ millions)
Table 75. Americas Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Country (2027-2032) & (K Sqm)
Table 76. Americas Thermally Conductive Adhesive Tape for Electronics Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. APAC Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Region (2027-2032) & (K Sqm)
Table 78. APAC Thermally Conductive Adhesive Tape for Electronics Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Europe Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Country (2027-2032) & (K Sqm)
Table 80. Europe Thermally Conductive Adhesive Tape for Electronics Revenue Forecast by Country (2027-2032) & ($ millions)
Table 81. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Country (2027-2032) & (K Sqm)
Table 82. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Revenue Forecast by Country (2027-2032) & ($ millions)
Table 83. Global Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Carrier Structure Types (2027-2032) & (K Sqm)

+357 96 030922
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Table 84. Global Thermally Conductive Adhesive Tape for Electronics Revenue Forecast by Carrier Structure Types (2027-2032) & ($ millions)
Table 85. Global Thermally Conductive Adhesive Tape for Electronics Sales Forecast by Application (2027-2032) & (K Sqm)
Table 86. Global Thermally Conductive Adhesive Tape for Electronics Revenue Forecast by Application (2027-2032) & ($ millions)
Table 87. 3M Company Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 88. 3M Company Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 89. 3M Company Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 90. 3M Company Main Business
Table 91. 3M Company Latest Developments
Table 92. Nitto Denko Corporation Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 93. Nitto Denko Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 94. Nitto Denko Corporation Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 95. Nitto Denko Corporation Main Business
Table 96. Nitto Denko Corporation Latest Developments
Table 97. Henkel AG & Co. KGaA Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 98. Henkel AG & Co. KGaA Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 99. Henkel AG & Co. KGaA Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 100. Henkel AG & Co. KGaA Main Business
Table 101. Henkel AG & Co. KGaA Latest Developments
Table 102. Parker-Hannifin Corporation Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 103. Parker-Hannifin Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 104. Parker-Hannifin Corporation Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 105. Parker-Hannifin Corporation Main Business
Table 106. Parker-Hannifin Corporation Latest Developments

+357 96 030922
info@marketpublishers.com

Table 107. tesa SE Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 108. tesa SE Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 109. tesa SE Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 110. tesa SE Main Business
Table 111. tesa SE Latest Developments
Table 112. Qnity Electronics, Inc. Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 113. Qnity Electronics, Inc. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 114. Qnity Electronics, Inc. Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 115. Qnity Electronics, Inc. Main Business
Table 116. Qnity Electronics, Inc. Latest Developments
Table 117. Shin-Etsu Chemical Co., Ltd. Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 118. Shin-Etsu Chemical Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 119. Shin-Etsu Chemical Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 120. Shin-Etsu Chemical Co., Ltd. Main Business
Table 121. Shin-Etsu Chemical Co., Ltd. Latest Developments
Table 122. Avery Dennison Corporation Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 123. Avery Dennison Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 124. Avery Dennison Corporation Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 125. Avery Dennison Corporation Main Business
Table 126. Avery Dennison Corporation Latest Developments
Table 127. Lohmann GmbH & Co. KG Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 128. Lohmann GmbH & Co. KG Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 129. Lohmann GmbH & Co. KG Thermally Conductive Adhesive Tape for

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Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 130. Lohmann GmbH & Co. KG Main Business
Table 131. Lohmann GmbH & Co. KG Latest Developments
Table 132. Boyd Corporation Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 133. Boyd Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 134. Boyd Corporation Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 135. Boyd Corporation Main Business
Table 136. Boyd Corporation Latest Developments
Table 137. Saint-Gobain Performance Plastics Corporation Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 138. Saint-Gobain Performance Plastics Corporation Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 139. Saint-Gobain Performance Plastics Corporation Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 140. Saint-Gobain Performance Plastics Corporation Main Business
Table 141. Saint-Gobain Performance Plastics Corporation Latest Developments
Table 142. T-Global Technology Limited Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 143. T-Global Technology Limited Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 144. T-Global Technology Limited Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 145. T-Global Technology Limited Main Business
Table 146. T-Global Technology Limited Latest Developments
Table 147. SHIU LI TECHNOLOGY CO., LTD. Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 148. SHIU LI TECHNOLOGY CO., LTD. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 149. SHIU LI TECHNOLOGY CO., LTD. Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 150. SHIU LI TECHNOLOGY CO., LTD. Main Business

+357 96 030922
info@marketpublishers.com

Table 151. SHIU LI TECHNOLOGY CO., LTD. Latest Developments
Table 152. Anhui Fuyin New Materials Co., Ltd. Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 153. Anhui Fuyin New Materials Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 154. Anhui Fuyin New Materials Co., Ltd. Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 155. Anhui Fuyin New Materials Co., Ltd. Main Business
Table 156. Anhui Fuyin New Materials Co., Ltd. Latest Developments
Table 157. Shurtape Technologies, LLC Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 158. Shurtape Technologies, LLC Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 159. Shurtape Technologies, LLC Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 160. Shurtape Technologies, LLC Main Business
Table 161. Shurtape Technologies, LLC Latest Developments
Table 162. Crown Basic Information, Thermally Conductive Adhesive Tape for Electronics Manufacturing Base, Sales Area and Its Competitors
Table 163. Crown Thermally Conductive Adhesive Tape for Electronics Product Portfolios and Specifications
Table 164. Crown Thermally Conductive Adhesive Tape for Electronics Sales (K Sqm), Revenue ($ Million), Price (US$/Sq m) and Gross Margin (2021-2026)
Table 165. Crown Main Business
Table 166. Crown Latest Developments

+357 96 030922
info@marketpublishers.com

# List Of Figures

## LIST OF FIGURES

Figure 1. Picture of Thermally Conductive Adhesive Tape for Electronics
Figure 2. Thermally Conductive Adhesive Tape for Electronics Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Thermally Conductive Adhesive Tape for Electronics Sales Growth Rate 2021-2032 (K Sqm)
Figure 7. Global Thermally Conductive Adhesive Tape for Electronics Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Thermally Conductive Adhesive Tape for Electronics Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country/Region (2025)
Figure 10. Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Carrier-Based Thermally Conductive Adhesive Tape
Figure 12. Product Picture of Substrate-Free Thermally Conductive Adhesive Transfer Tape
Figure 13. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types in 2026
Figure 14. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Carrier Structure Types (2021-2026)
Figure 15. Product Picture of Low Thermal Conductivity (<0.5 W/m·K)
Figure 16. Product Picture of Medium Thermal Conductivity (0.5–1.5 W/m·K)
Figure 17. Product Picture of High Thermal Conductivity (>1.5 W/m·K)
Figure 18. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Z-Axis Thermal Conductivity Types in 2026
Figure 19. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Z-Axis Thermal Conductivity Types (2021-2026)
Figure 20. Product Picture of Acrylic-Based Thermally Conductive Adhesive Tape
Figure 21. Product Picture of Silicone-Based Thermally Conductive Adhesive Tape
Figure 22. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Pressure-Sensitive Adhesive Types in 2026
Figure 23. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market

+357 96 030922
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Share by Pressure-Sensitive Adhesive Types (2021-2026)
Figure 24. Thermally Conductive Adhesive Tape for Electronics Consumed in Consumer Electronics Thermal Management (Processors, Displays, and Mobile Devices)
Figure 25. Global Thermally Conductive Adhesive Tape for Electronics Market: Consumer Electronics Thermal Management (Processors, Displays, and Mobile Devices) (2021-2026) & (K Sqm)
Figure 26. Thermally Conductive Adhesive Tape for Electronics Consumed in Automotive Electronics Thermal Management (ECUs, Power Modules, and Infotainment Systems)
Figure 27. Global Thermally Conductive Adhesive Tape for Electronics Market: Automotive Electronics Thermal Management (ECUs, Power Modules, and Infotainment Systems) (2021-2026) & (K Sqm)
Figure 28. Thermally Conductive Adhesive Tape for Electronics Consumed in Communications and Data Center Electronics (Base Stations, Servers, and Network Equipment)
Figure 29. Global Thermally Conductive Adhesive Tape for Electronics Market: Communications and Data Center Electronics (Base Stations, Servers, and Network Equipment) (2021-2026) & (K Sqm)
Figure 30. Thermally Conductive Adhesive Tape for Electronics Consumed in LED Lighting Thermal Management (LED Boards and Heat Sinks)
Figure 31. Global Thermally Conductive Adhesive Tape for Electronics Market: LED Lighting Thermal Management (LED Boards and Heat Sinks) (2021-2026) & (K Sqm)
Figure 32. Thermally Conductive Adhesive Tape for Electronics Consumed in Industrial and Power Electronics (PCBs, Power Devices, and Control Modules)
Figure 33. Global Thermally Conductive Adhesive Tape for Electronics Market: Industrial and Power Electronics (PCBs, Power Devices, and Control Modules) (2021-2026) & (K Sqm)
Figure 34. Thermally Conductive Adhesive Tape for Electronics Consumed in Semiconductor Packaging and Component Assembly
Figure 35. Global Thermally Conductive Adhesive Tape for Electronics Market: Semiconductor Packaging and Component Assembly (2021-2026) & (K Sqm)
Figure 36. Thermally Conductive Adhesive Tape for Electronics Consumed in Others
Figure 37. Global Thermally Conductive Adhesive Tape for Electronics Market: Others (2021-2026) & (K Sqm)
Figure 38. Global Thermally Conductive Adhesive Tape for Electronics Sale Market Share by Application (2025)
Figure 39. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Application in 2025

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Figure 40. Thermally Conductive Adhesive Tape for Electronics Sales by Company in 2025 (K Sqm)
Figure 41. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Company in 2025
Figure 42. Thermally Conductive Adhesive Tape for Electronics Revenue by Company in 2025 ($ millions)
Figure 43. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Company in 2025
Figure 44. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Geographic Region (2021-2026)
Figure 45. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Geographic Region in 2025
Figure 46. Americas Thermally Conductive Adhesive Tape for Electronics Sales 2021-2026 (K Sqm)
Figure 47. Americas Thermally Conductive Adhesive Tape for Electronics Revenue 2021-2026 ($ millions)
Figure 48. APAC Thermally Conductive Adhesive Tape for Electronics Sales 2021-2026 (K Sqm)
Figure 49. APAC Thermally Conductive Adhesive Tape for Electronics Revenue 2021-2026 ($ millions)
Figure 50. Europe Thermally Conductive Adhesive Tape for Electronics Sales 2021-2026 (K Sqm)
Figure 51. Europe Thermally Conductive Adhesive Tape for Electronics Revenue 2021-2026 ($ millions)
Figure 52. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales 2021-2026 (K Sqm)
Figure 53. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Revenue 2021-2026 ($ millions)
Figure 54. Americas Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country in 2025
Figure 55. Americas Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Country (2021-2026)
Figure 56. Americas Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
Figure 57. Americas Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Application (2021-2026)
Figure 58. United States Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 59. Canada Thermally Conductive Adhesive Tape for Electronics Revenue

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Growth 2021-2026 ($ millions)
Figure 60. Mexico Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 61. Brazil Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 62. APAC Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Region in 2025
Figure 63. APAC Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Region (2021-2026)
Figure 64. APAC Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
Figure 65. APAC Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Application (2021-2026)
Figure 66. China Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 67. Japan Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 68. South Korea Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 69. Southeast Asia Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 70. India Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 71. Australia Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 72. China Taiwan Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 73. Europe Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country in 2025
Figure 74. Europe Thermally Conductive Adhesive Tape for Electronics Revenue Market Share by Country (2021-2026)
Figure 75. Europe Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
Figure 76. Europe Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Application (2021-2026)
Figure 77. Germany Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 78. France Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)

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Figure 79. UK Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 80. Italy Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 81. Russia Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 82. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Country (2021-2026)
Figure 83. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Carrier Structure Types (2021-2026)
Figure 84. Middle East & Africa Thermally Conductive Adhesive Tape for Electronics Sales Market Share by Application (2021-2026)
Figure 85. Egypt Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 86. South Africa Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 87. Israel Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 88. Turkey Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 89. GCC Countries Thermally Conductive Adhesive Tape for Electronics Revenue Growth 2021-2026 ($ millions)
Figure 90. Manufacturing Cost Structure Analysis of Thermally Conductive Adhesive Tape for Electronics in 2026
Figure 91. Manufacturing Process Analysis of Thermally Conductive Adhesive Tape for Electronics
Figure 92. Industry Chain Structure of Thermally Conductive Adhesive Tape for Electronics
Figure 93. Channels of Distribution
Figure 94. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Forecast by Region (2027-2032)
Figure 95. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share Forecast by Region (2027-2032)
Figure 96. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share Forecast by Carrier Structure Types (2027-2032)
Figure 97. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share Forecast by Carrier Structure Types (2027-2032)
Figure 98. Global Thermally Conductive Adhesive Tape for Electronics Sales Market Share Forecast by Application (2027-2032)

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Figure 99. Global Thermally Conductive Adhesive Tape for Electronics Revenue Market Share Forecast by Application (2027-2032)

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