

# **Electronic Potting Compound Market for EV charger, By Charger Type (AC, DC), Setup Type (Wall Mount, Stationary), Material Type (Polyurethane, Silicone, Epoxy), Curing Technology, Application, EV Component, and Region - Global Forecast to 2032**

<https://marketpublishers.com/r/E09D0D571B26EN.html>

Date: February 2026

Pages: 288

Price: US\$ 4,950.00 (Single User License)

ID: E09D0D571B26EN

## **Abstracts**

The electronic potting compound market for EV charger is projected to reach USD 0.96 billion by 2032 from USD 0.36 billion in 2025 at a CAGR of 14.9%. AC chargers are increasingly adopting compact, integrated power and control boards, driving demand for low-viscosity potting compounds that ensure complete coverage without affecting heat dissipation. In DC chargers, the transition toward ultra-fast charging is intensifying the need for high-thermal-conductivity and high-partial-discharge-resistant potting materials. DC charger designs are also moving toward liquid-cooled and sealed power modules, increasing potting thickness and material consumption. Across both charger types, compatibility with automated dispensing and fast thermal curing is becoming a key material requirement. Additionally, materials with long-term resistance to moisture ingress and electrical tracking are gaining importance as outdoor charger deployments expand.

“DC charger is projected to lead the electronic potting compound market for EV charger during the forecast period.”

DC chargers are expected to lead the electronic potting compound market for EV chargers during the forecast period due to their significantly higher power density and operating stress compared with AC or onboard chargers. Public DC charging sites and fleet depots operate in harsher environments exposed to moisture, vibration, and continuous duty cycles, which increase demand for robust encapsulation to ensure electrical insulation, environmental protection, and vibration damping. Large-scale

infrastructure rollouts by OEMs and charge network operators are prioritizing high-power DC installations along highways, at commercial sites, and within fleet depots, concentrating unit volumes in charger platforms that require heavy and consistent potting usage. Material suppliers such as Parker Hannifin Corp are responding with low viscosity, fast flow thermally conductive potting compounds that can fill narrow gaps and efficiently transfer heat to housings and heat sinks in high power DC modules, while direct injection and pourable systems with faster curing and in-line quality control are gaining traction to support high throughput manufacturing. In parallel, ongoing government backed programs such as the US NEVI (National Electric Vehicle Infrastructure) initiative and China's continued expansion of ultra fast public charging corridors are accelerating the deployment of high power DC chargers. For instance, in August 2025, the California Energy Commission launched a USD 55 million Fast Charge California Program to subsidize public fast charger installations, including high-power DC stations at businesses and public sites. These investments increase demand for thermally robust and electrically reliable potting compounds, as each new high-power DC installation requires substantial encapsulation material to ensure long-term operational stability and regulatory compliance.

“The epoxy material is projected to register the highest growth in the electronic potting compound market for EV charger during the forecast period.”

The epoxy segment is projected to register the highest growth in the electronic potting compound market for EV charger during the forecast period. Epoxy resins play a critical role in EV charger potting applications due to their high mechanical strength and structural rigidity, which provide durable protection for sensitive electronic and power components exposed to thermal cycling, vibration, and mechanical shock. They offer excellent electrical insulation and chemical resistance, making them well-suited for high voltage AC/DC conversion and safety-critical functions in both onboard and offboard charging systems. Epoxy potting compounds also deliver strong moisture and contaminant barrier performance, extending the operational life of EV charger electronics across diverse environmental conditions. Their formulation flexibility allows the incorporation of thermally conductive fillers, enabling improved heat dissipation in high-power modules and dense power electronics. In addition, the mature global manufacturing base and well-established supplier ecosystem for epoxy systems support scalability and cost efficiency in EV charger production. There is also growing emphasis on environmentally compliant epoxy formulations with lower VOC emissions and alignment with evolving regulations such as REACH, without sacrificing insulation or durability. For instance, in November 2025, Wevo Chemie introduced flame-retardant, thermally conductive epoxy potting resins designed to meet strict safety standards, such

as EN 45545-2 and UL 94 V-0. These materials offer strong resistance to partial discharge and improved flow characteristics, making them suitable for high-voltage and high-performance applications, including advanced EV charger encapsulation.

“Europe is projected to hold a significant share in the electronic potting compound market for EV charger during the forecast period.”

Europe is rapidly expanding its EV charging infrastructure with public charger installations exceeding 1.2 million units by the end of 2025 and continued strong growth in fast and ultra-fast charging, driving higher volumes of charger electronics that require potting and encapsulation. Strong regulatory and policy support, most notably the EU's Alternative Fuels Infrastructure Regulation and broader emission reduction targets, mandate widespread deployment of high-power chargers across member states, increasing demand for durable and compliant potting materials. European charger OEMs and charging service providers such as Wallbox are investing heavily in smart, high-density, and ultra-fast charging hubs that integrate complex power and control electronics, benefiting from potting for insulation, thermal management, and environmental protection. The region's strong emphasis on interoperability and safety standards, including CCS implementations with ISO 15118 features, further raises performance and reliability requirements for electronic protection materials, encouraging the use of advanced potting compounds in charger designs. The rapidly increasing share of DC and ultra-fast chargers in public networks is also elevating the need for thermally conductive and mechanically robust potting compounds to manage heat and ensure long-term reliability. At the same time, harmonized interfaces, communication protocols, and safety frameworks across the EU simplify charger platforms and promote consistency in potting material specifications. The region is also home to leading potting compound manufacturers, including Henkel, Electrolube, Demak Group, and ELANTAS.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: OEM – 20 %, Tier 1 – 70%, and Tier 2 – 10%

By Designation: C-level – 40%, Directors – 35%, and Others – 25%

By Region: Asia Pacific – 35%, North America – 35%, Europe – 25%, and Rest of the World – 5%

The electronic potting compound market for EV charger is dominated by major players, including Henkel Corporation (Germany), Dow (US), Parker Hannifin Corp (US), ELANTAS (Germany), and Momentive (US). These companies are expanding their portfolios to strengthen their position in the electronic potting compound market for EV charger.

### **Research Coverage:**

The report covers the electronic potting compound market for EV charger in terms of setup type (wall mount, stationary), charger type (AC charger, DC charger), application (power electronics, HV components, busbars, and sensor relays, PCB and control modules, connector cable IP zones, charging gun, others), material type (polyurethane, epoxy, silicone), curing technology (room temperature cured, thermal cured, UV cured), EV component (electric motor stator, EV battery cells, EV battery cooling system, on-board charger, in-vehicle charging connector, in-vehicle power converter, others), and region. It covers the competitive landscape and company profiles of the significant players in the electronic potting compound market for EV charger.

The study also includes an in-depth competitive analysis of the key market players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

### **Key Benefits of Buying the Report:**

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the electronic potting compound market for EV charger and their subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies.

The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report will help market leaders/new entrants with information on various trends in the electronic potting compound market for EV charger based on setup type, charger type, application, material type, curing technology, EV component, and region.

**The report provides insight into the following points:**

Analysis of key drivers (rising power density in charger electronics driving demand for high-thermal-conductivity potting materials, tightening electrical safety, insulation, and high-voltage testing standards, expansion of high-power DC fast charging drives advanced thermal cycling and stress-resistant potting requirements), restraints (regulatory tightening on flame-retardant chemistries and additive bans, restrictions on SVHCs under REACH and tightening RoHS scrutiny), opportunities (commercialization of high-thermal-conductivity silicone potting for WBG-enabled power modules, turnkey integration of automated dispensing and advanced potting materials for high-volume EV charger production), and challenges (SiC/GaN high-stress behavior creating new reliability failure modes for existing potting systems, circularity and end-of-life issues limiting high-performance polymer choices)

**Product Development/Innovation:** Detailed insights into upcoming technologies, research & development activities, and product launches in the electronic potting compound market for EV charger

**Market Development:** Comprehensive information about lucrative markets across varied regions

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the electronic potting compound market for EV charger

**Competitive Assessment:** In-depth assessment of market share, growth strategies, and product offerings of leading players, such as Henkel Corporation (Germany), Dow (US), Parker Hannifin Corp (US), ELANTAS (Germany), and Momentive (US), in the electronic potting compound market for EV charger

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