

# **Thermal Interface Materials Market by Chemistry (Silicone, Epoxy, Polyimide), Type (Greases & adhesives, Tapes & Films, Gap Fillers), Application (Computers, Telecom, Consumer Durables, Medical Devices) and Region - Global Forecast to 2027**

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## **Abstracts**

Growth in the thermal interface materials market can primarily be attributed to the growing involvement of amorphous polyethylene terephthalate in the computers, telecom, medical devices, among others. Thermal interface materials (TIMs) are used to remove the heat generated by semiconductors to maintain the junction temperature of electronic & electrical components within safe operating limits. This heat removal process involves the conduction from a package surface to a heat spreader that can transfer the heat to the ambient environment more efficiently. The global thermal interface materials market size is estimated at USD 3.4 billion in 2022 and is projected to reach USD 5.6 billion by 2027, at a CAGR of 10.5%. Growth in the thermal interface materials market can primarily be attributed to the increasing use of TIMs in end-use industries and the growing electronics industry.

The production of TIMs is driven by its large-scale industrial applications, such as computers, telecom, medical devices, industrial machinery, consumer durables, and automotive electronics. The growing consumer electronics industry is a major driver. The demand for TIMs in developed countries, such as the US, the UK, Germany, and Canada, is high, owing to numerous development strategies adopted by manufacturing companies. The demand for TIMs in Asia Pacific is expected to increase at the highest rate, mainly due to the transportation sector, as China represents the largest automotive market globally. The growing automotive industry is expected to drive the TIMs market in the region. The major challenge for manufacturers of TIMs is the stringent government regulation on the reduction of VOC content. The untapped markets of the

Middle East are a major opportunity for the growth of the players in the market. Increasing development strategies are also an excellent growth opportunity for manufacturers to have better control over the cost and quality of products.

“Silicone is the largest and fastest-growing chemistry segment of the thermal interface materials market.”

The thermal interface materials market is segmented on the basis of chemistry into silicone, epoxy, polyimide, and others. Silicone is largest and is expected to witness the fastest growth rate. Silicone exhibits good resistance to a wide range of temperatures, from -55°C to +300°C, resistance to chemical attack, resistance to shock & vibration, stability under mechanical stress, stability against weathering, and greater hydrostability. It is also handled without any special precautionary measures and offers easy processing without the need for oven drying or concerns about exothermic heat during the processing. Silicone is used in various TIMs such as greases & adhesives, encapsulants & potting compounds, thermal pads, and gap fillers.

“Greases & adhesives is the largest type segment of the thermal interface materials market.”

The thermal interface materials market is segmented on the basis of type into greases & adhesives, tapes & films, gap fillers, metal-based TIMs, phase change materials, and others. Greases & adhesives is largest type. Thermal greases & adhesives are applied to one of the two mating surfaces; when the surfaces are pressed together, the grease spreads to fill the void. Thermal greases & adhesives are normally packaged in a syringe, tube, or a small plastic sachet. OEMs prefer to use greases & adhesives because of their ability to flow into any nook of the intended application and conform to a wide range of surface roughness present on the housing, heat spreader, or heat sink surface. Thermal greases & adhesives have other competitive advantages such as cost, rework-ability, low thermal resistance, and the ability to form ultra-thin bond lines. The manufacturing costs of greases & adhesives are lower as these materials do not need to be coated and cured into a sheet and cut to shape.

“Computers is the largest application of thermal interface materials market.”

The thermal interface materials market is segmented on the basis of applications into computers, telecom, consumer durables, medical devices, industrial machinery, automotive electronics, and others. Among these, the computer segment is the largest application. Computer components, such as CPUs, chipsets, graphics cards, and hard

disk drives, are susceptible to failure in case of overheating. TIMs are used in computers to remove the excess heat to maintain the components operating temperature limits. TIMs are used in computers to optimize the performance and reliability for smooth functioning. TIMs are used for improving the heat flow in computers by filling voids or irregularities between the heat sink and SSE base plate mounting surfaces. TIMs have comparatively greater thermal conductivity than the air they replace, thus allowing efficient heat transfer resulting in the improved performance of computers. The use of TIMs in computers is growing at a high rate because of the increased demand for cloud and supercomputing. The increased demand for supercomputing is driving the market for high-performance silicon and TIMs.

“APAC is the fastest-growing market for thermal interface materials.”

APAC is the largest market for thermal interface materials market due to increased investments by developing countries of the region, such as Indonesia and India, are supporting market growth in the region. Another major driving factor is the increased demand for the miniaturization of electronic devices.

The breakdown of primary interviews is given below:

By Company Type: Tier 1 – 15%, Tier 2 – 25%, and Tier 3 –60%

By Designation: C-Level Executives – 12%, Director-Level – 20%, and Others – 68%

By Region: North America – 40%, Europe – 30%, APAC – 20%, and South America – 10%

The key companies profiled in this report on the thermal interface materials market include Honeywell International Inc. (US), 3M (US), Henkel AG & Co. KGaA (Germany), Parker Hannifin Corporation (US), Dow Corning Corporation (US), Laird Technologies (US), Momentive Performance Materials (US), Indim Corporation (US), Wakefield-Vette (US), and Zalma Tech Co. Ltd. (South Korea) are the key players operating in the thermal interface materials market.

## Research Coverage

The thermal interface materials market has been segmented based on chemistry, type,

*Thermal Interface Materials Market by Chemistry (Silicone, Epoxy, Polyimide), Type (Greases & adhesives, Tapes...*

application, and region. This report covers the thermal interface materials market and forecasts its market size until 2027. It also provides detailed information on company profiles and competitive strategies adopted by the key players to strengthen their position in the thermal interface materials market. The report also provides insights into the drivers and restraints in the thermal interface materials market along with opportunities and challenges. The report also includes profiles of top manufacturers in the thermal interface materials market.

### Reasons to Buy the Report

The report is expected to help market leaders/new entrants in the following ways:

1. This report segments the thermal interface materials and provides the closest approximations of revenue numbers for the overall market and its segments across different verticals and regions.
2. This report is expected to help stakeholders understand the pulse of the thermal interface materials market and provide information on key market drivers, restraints, challenges, and opportunities influencing the market growth.
3. This report is expected to help stakeholders obtain an in-depth understanding of the competitive landscape of the thermal interface materials market and gain insights to improve the position of their businesses. The competitive landscape section includes detailed information on strategies, such as merger & acquisition, new product developments, expansions, and collaborations.

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\*Details on Business Overview, Products and solutions, Recent Developments, SWOT analysis, MnM view, Key strengths/right to win, Strategic choices made, Weakness/competitive threats might not be captured in case of unlisted companies.

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## About

The Thermal Interface Material market size in terms of value is projected to grow at a CAGR of 11.0% between 2015 & 2020, and is estimated to increase to \$962.0 Million by 2020.

The market is segmented and values are projected on the basis of key regions, such as North America, Europe, APAC, and RoW (Rest of the World). The leading countries are covered and projected for each region. Further, the market is segmented and values are estimated on the basis of different types and applications.

### APAC: Largest and Fastest-Growing Market of TIMs

APAC is currently the largest and fastest-growing market for TIMs. China is the largest consumer of TIMs in this region. The market size for thermal interface materials in APAC is projected to reach \$724.5 Million by 2020.

The favorable market forces driving the market for TIMs in APAC are:

- Comparatively lower labor and transportation costs

- Increasing demand for energy efficient lightings

- Growing end-use industries in major APAC countries such as China, India, South Korea

- Greases & Adhesives: Largest Segment of TIMs Market

Greases & Adhesives is currently the largest segment of thermal interface material market. Thermal grease is a paste comprised of thermally conductive ceramic fillers in silicone or hydrocarbon oils. APAC is currently the largest and fastest-growing market for greases & adhesives segment. The market size, in terms of value, of this segment in APAC is projected to grow at a CAGR of 12.0% between 2015 and 2020.

Computer is the largest segment of thermal interface material market by applications. TIMs are commonly used for enhancing the thermal conductivity from the CPU or GPU to the heatsink coolers. Compute components such as CPUs, chipsets, graphics cards, and hard disk drives are susceptible to failure in case of overheating. In terms of value, the market size for computers segment is projected to grow at a CAGR of 11.3% between 2015 and 2020.



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