

# **Electrically Conductive Adhesives Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Chemistry (Epoxy, Silicone, Acrylic, Polyurethane, Others), By Application (Automotive, Consumer Electronics, Aerospace, Biosciences, Others), By Region and Competition**

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## **Abstracts**

Global Electrically Conductive Adhesives Market has valued at USD2.97 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.89% through 2028. Electrically conductive adhesives are commonly used in electronics applications where components need to be securely held in place while allowing electrical current to flow between them. Unlike general adhesives such as anaerobic, cyanoacrylates, epoxies, and acrylic-based adhesives, which act as electrical insulators depending on the space between components, electrically conductive adhesives provide conductivity. They not only ensure proper electrical connection but also offer better thermal conductivity, effectively managing heat by directing it away from sensitive components and towards heat sinks.

In situations where soldering is not feasible due to the sensitivity of electronic components to heat, electrically conductive adhesives come to the rescue. These adhesives are particularly useful for PCBs with components mounted on both sides, making the assembly process easier and preventing components from sliding off when parts are soldered on the top. Using electrically conductive adhesive eliminates the need for solder re-flow, streamlining the electrical assembly process.

As the demand for technologically advanced electronic devices continues to rise, the

demand for electrically conductive adhesives in the electronics industry is expected to expand substantially. These adhesives play a crucial role in maintaining conductivity when linked to electronic components, ensuring reliable and efficient performance.

Furthermore, the growth of electric vehicles, which are powered by electric generators, solar panels, or batteries, is another significant factor driving the market. With increasing concerns about vehicular emissions and strict regulations in several countries, electric vehicles are becoming a preferred alternative to fuel-based vehicles. The growth of public charging infrastructure in countries like China, Norway, France, and other developed nations further supports the market's expansion. Technological advancements in electric vehicles and proactive government initiatives present numerous opportunities for market growth.

However, it is important to note that the fluctuating costs of raw materials pose challenges to the growth of the Global Electrically Conductive Adhesives Market. Despite this hurdle, the market's potential for growth remains promising due to its indispensable role in the ever-evolving electronics industry.

## Key Market Drivers

### Growing Demand of Electrically Conductive Adhesives from Automotive Industry

Electrically conductive adhesives are remarkable substances that serve a dual purpose: bonding materials together and conducting electricity. These adhesives, often formulated with epoxy resins filled with metallic particles, exhibit exceptional conductivity and robust adhesion. Their widespread application in electronic devices stems from their unique ability to establish electrical connections while providing mechanical strength.

With the surge in electric and hybrid vehicles, the automotive industry has witnessed a substantial increase in the number of electronic components integrated into automobiles. Electrically conductive adhesives play a crucial role in securing these components, ensuring reliable electrical connections that are vital for the seamless operation of various systems.

Moreover, the automotive industry is incessantly exploring avenues to reduce vehicle weight and enhance fuel efficiency. By substituting traditional fasteners such as screws and rivets, electrically conductive adhesives significantly contribute to lightweight

construction. This not only promotes fuel efficiency but also enables manufacturers to meet stringent regulatory standards without compromising on safety or performance.

In addition to their electrical conductivity and bonding capabilities, these adhesives also exhibit efficient heat dissipation properties. This attribute is of utmost importance, as it helps prevent overheating of electronic components, thereby ensuring their longevity and optimal functionality.

The surging demand for electrically conductive adhesives in the automotive industry has had a profound impact on the global market. As automobile manufacturers increasingly recognize and embrace the advantages of these adhesives, the market is projected to witness remarkable growth in the forthcoming years.

Furthermore, the paradigm shift towards electric vehicles (EVs) and autonomous vehicles is expected to further propel the demand for electrically conductive adhesives. Given the heavy reliance of these vehicles on advanced electronics, the need for efficient and reliable adhesives becomes paramount, making electrically conductive adhesives an indispensable component of their construction.

To conclude, the escalating demand for electrically conductive adhesives in the automotive industry serves as a significant driving factor for the global market. With ongoing advancements in the automotive sector, particularly in the realm of electric and autonomous vehicles, the demand for these adhesives is poised to witness substantial growth in the coming years. As such, the global electrically conductive adhesives market is expected to experience robust expansion, owing to its indispensable role in the ever-evolving automotive industry.

### Growing Demand of Electrically Conductive Adhesives from Electronic Industry

Electrically conductive adhesives (ECAs) are compounds that offer both adhesive bonding and electrical conductivity. These adhesives, typically formulated from epoxy resins filled with metallic particles, provide excellent adhesion and conductivity. They have become an essential component in electronic devices, enabling reliable electrical connections while also providing mechanical strength.

ECAs are used in the assembly of circuits in electronic devices. They enable miniaturization by allowing for smaller, more compact designs. This miniaturization trend is driven by the increasing demand for portable and wearable electronics, where size and weight are critical factors. ECAs play a crucial role in ensuring the integrity and

performance of these compact electronic devices.

ECAs are used to mount components on printed circuit boards (PCBs). They are particularly useful in surface mount technology, where they help secure components and form electrical connections. The ability of ECAs to provide both mechanical and electrical properties makes them ideal for this application. Additionally, ECAs offer advantages over other traditional methods, such as soldering, as they eliminate the need for high-temperature processes and reduce the risk of thermal damage to sensitive components.

ECAs are used for electromagnetic interference (EMI) and radio frequency interference (RFI) shielding. They provide a conductive path for grounding or shielding electronic assemblies. With the increasing prevalence of wireless communication and the growing complexity of electronic systems, EMI/RFI shielding has become crucial to ensure optimal performance and reliability. ECAs offer an effective solution for mitigating interference and maintaining signal integrity.

Furthermore, the advancement of technology and the trend toward miniaturization in electronics are projected to drive this demand even further. As electronic devices become smaller and more complex, the need for efficient and reliable adhesives like ECAs becomes increasingly critical. Moreover, the demand for ECAs is expected to be fueled by emerging applications in industries such as automotive, aerospace, and healthcare, where reliable electrical connections are vital.

In summary, the escalating demand for electrically conductive adhesives in the electronics industry is a major driver of the global market. With the ongoing technological advancements and trends in the electronics sector, this demand is expected to continue rising. Therefore, the global electrically conductive adhesives market is set for robust growth, propelled by its vital role in the electronics industry.

## Key Market Challenges

### Complexities Related with Long-Term Reliability and Pricing

Electrically conductive adhesives (ECAs) are materials that offer both adhesive bonding and electrical conductivity. These adhesives have become essential components in various industries, including electronics, automotive, and aerospace. They provide a reliable and efficient solution for joining electrical components, ensuring optimal performance and functionality.

Despite their increasing demand, concerns over their long-term reliability and high cost may hinder their wider adoption. One of the main challenges faced by the ECAs market is the question of long-term reliability. Factors such as thermal aging, moisture exposure, and mechanical stress can affect the total electrical conductivity of adhesives, leading to potential performance degradation over time. Moreover, non-linear behavior under varying conditions can also impact the mechanical properties of adhesive joints, compromising the overall structural integrity.

Additionally, certain applications like RFID tags often have a shorter lifetime than their etched counterparts, which can limit their use in long-term applications like passports. The need for long-term reliability and durability in industries such as aerospace and automotive further emphasizes the importance of addressing these challenges.

These reliability issues pose a significant challenge for the ECAs market. Ensuring the long-term reliability of these adhesives is crucial for their wider acceptance, especially in industries where durability and longevity are paramount. Extensive research and development efforts are underway to enhance the reliability and performance of ECAs, focusing on improving their resistance to environmental factors and optimizing their electrical and mechanical properties.

Another major challenge in the ECAs market is the high cost of these adhesives. While they offer numerous benefits, their price can be a barrier to adoption in some applications. The cost factor becomes even more critical when considering the competitive landscape of the adhesives market, where cheaper alternatives are readily available. To address this challenge, manufacturers are exploring cost-effective production methods, optimizing the formulation of ECAs, and seeking alternative raw materials without compromising their performance.

Moreover, the cost of ECAs can be influenced by various factors, including the price of raw materials and production costs. Any fluctuations in these factors can further increase the price of ECAs, making them less attractive to potential end-users. Collaborative efforts between manufacturers, suppliers, and end-users are necessary to streamline the supply chain, reduce costs, and make ECAs more accessible to a wider range of applications.

In conclusion, while the global electrically conductive adhesives market is poised for significant growth, it must overcome the challenges related to long-term reliability and pricing. Addressing these issues is crucial for ensuring the wider adoption of ECAs

across various industries. As research and development continue in this field, solutions to these challenges are likely to emerge, further propelling the growth of the ECAs market. By improving their reliability, durability, and cost-effectiveness, ECAs can continue to revolutionize the way electrical components are assembled, enabling advanced technologies and innovations to thrive.

## Key Market Trends

### Growth in Flexible Electronics

Flexible electronics, also known as flex circuits, are revolutionizing the electronic industry with their unique characteristics. These electronic devices are built on flexible plastic substrates, allowing them to bend and conform to various shapes and surfaces. This flexibility opens up a world of possibilities, making them ideal for applications such as wearable devices, smartphones, and IoT devices.

The increasing popularity of flexible electronics has fueled the demand for Electrically Conductive Adhesives (ECAs), which play a crucial role in their manufacture. ECAs, including film adhesives, are widely used in flexible electronics due to their exceptional bonding properties. These adhesives provide strong and reliable connections, ensuring the durability and performance of the devices, even under harsh operating conditions.

The growth of flexible electronics is driving significant changes in the global ECAs market. As the demand for flexible electronics continues to rise, the need for ECAs is expected to grow in parallel. Moreover, the trend towards miniaturization in electronics further fuels this demand. As electronic devices become smaller and more complex, the role of efficient and reliable adhesives like ECAs becomes increasingly critical.

In conclusion, the growth of flexible electronics represents a pivotal trend in the global electrically conductive adhesives market. With continuous advancements in the electronics sector and the surging popularity of flexible and wearable electronics, this trend is poised to persist. As a result, the global electrically conductive adhesives market is projected to experience robust growth, driven by its indispensable role in the flourishing field of flexible electronics.

## Segmental Insights

### Chemistry Insights



Based on the category of chemistry, the epoxy segment emerged as the dominant player in the global market for Electrically Conductive Adhesives in 2022. Electrically conductive epoxy polymers are highly suitable for use in electrically conductive adhesives, particularly in processes where mechanical and thermal cracking pose significant challenges. These polymers offer a viable solution for joining heat-sensitive components that are unsuitable for soldering, making epoxy resins a popular choice.

In comparison to alternative options such as polyurethane or silicone, the utilization of electrically conductive epoxy polymers as a solder substitute brings several advantages. Not only does it result in reduced costs, but it also delivers superior performance and shorter production times. These factors are anticipated to drive the demand for epoxy polymers even further during the projected forecast period.

By incorporating electrically conductive epoxy polymers into adhesive applications, industries can benefit from enhanced reliability, improved efficiency, and increased versatility. This, in turn, opens up new possibilities for a wide range of electronic and electrical manufacturing applications. As technology advances and the need for reliable bonding solutions continues to grow, the importance of electrically conductive epoxy polymers becomes increasingly evident.

### Application Insights

The automotive segment is projected to experience rapid growth during the forecast period. In the automotive sector, electrically conductive adhesives are widely utilized as a connecting interconnect for advanced driver assistance systems (ADAS) cameras and radars, as well as light detection and ranging (LiDARs). These adhesives offer the advantage of lower processing temperatures and a robust connection with non-noble metallization, making them superior to solder pastes. With the increasing production of passenger light-duty electronic vehicles, the market for electrically conductive adhesives in the automobile sector is experiencing significant growth.

According to the International Energy Agency (IEA), the total production of passenger light-duty electronic vehicles reached 2 million units in 2019 and rose to 3.1 million units in 2020, marking a remarkable increase of 55%. This substantial growth can be attributed to the expanding automotive industry, which continues to propel the demand for these adhesives.

### Regional Insights

Asia Pacific emerged as the dominant player in the Global Electrically Conductive Adhesives Market in 2022, holding the largest market share in terms of value. The increasing demand for electrically conductive adhesives can be attributed to their widespread use across various industries, including automotive and aerospace. For example, in the Asia-Pacific region, the total vehicle production witnessed a significant growth from 17,818,598 units in September 2020 to 22,685,914 units in September 2021, indicating a remarkable increase of 27%. This surge in vehicle production further contributes to the demand for electrically conductive adhesives.

Moreover, the aerospace industry in Asia-Pacific is also experiencing rapid growth, with projections indicating that the aerospace and defense sector in India will reach a value of US\$70 billion by 2030. This growth is primarily driven by increased government initiatives and infrastructure upgrades, which require the use of electrically conductive adhesives for various applications.

Considering the expanding automotive, aerospace, and other industries in the Asia-Pacific region, the electrically conductive adhesives market is expected to witness substantial growth during the projected period. The demand for these adhesives is poised to increase as more industries recognize the benefits and applications of this advanced technology.

### Key Market Players

3M Company

Aremco LLC

Creative Materials Inc.

The Dow Chemical Company

HB Fuller Company

Henkel AG & Co. KGaA

HITEK Electronic Materials Ltd

Master Bond Inc.



Panacol-Elosol GmbH

Parker Hannifin Corp.

Report Scope:

In this report, the Global Electrically Conductive Adhesives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Electrically Conductive Adhesives Market, By Chemistry:

Epoxy

Silicone

Acrylic

Polyurethane

Others

Electrically Conductive Adhesives Market, By Application:

Automotive

Consumer Electronics

Aerospace

Biosciences

Others

Electrically Conductive Adhesives Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Electrically Conductive Adhesives Market.

### Available Customizations:

Global Electrically Conductive Adhesives Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

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