

# Asia Pacific Electronic Thermal Management Materials Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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## Abstracts

The Asia Pacific electronic thermal management materials market was valued at approximately USD 1,241.73 million in 2023 and is projected to grow to USD 2,143.02 million by 2031, reflecting a compound annual growth rate (CAGR) of 7.1% during the forecast period.

### Growth Drivers in the Market

The market is experiencing significant growth due to advancements in electronic thermal management materials that are essential for addressing the increasing thermal challenges posed by modern electronics. As electronic devices become more powerful and compact, there is a pressing need for materials that offer improved thermal conductivity, flexibility, and durability to effectively manage higher heat loads. Innovations in materials such as graphene and carbon-based compounds provide ultra-high thermal conductivity and lightweight solutions, making them particularly suitable for high-performance electronics and electric vehicles (EVs). These advancements enable manufacturers to create more efficient and compact thermal solutions, enhancing device performance and longevity.

Research indicates that cooling systems account for approximately 40% of energy usage in data centers, equating to around 8 terawatt-hours annually. Advanced thermal management materials can remove significant amounts of heat from small areas, thereby reducing the energy required for cooling systems by up to 65%, which is a substantial improvement in overall electronics cooling efficiency.

### Strategic Collaborations and Innovations

Strategic partnerships and new product launches are pivotal in driving innovation within the market. For example, in September 2024, Asahi Kasei showcased its range of thermal management materials at FAKUMA 2024, including polymer solutions tailored for EV applications. Similarly, in October 2024, Dow and Carbic announced a groundbreaking partnership to develop a multi-generational thermal interface material (TIM) product line aimed at high-performance electronics across various sectors, including mobility and semiconductors. Such collaborations not only accelerate research and development but also expand market reach by tapping into new application areas and integrating with cutting-edge electronic systems.

### Advancements in Thermal Management Technologies

Phase change materials (PCMs), which absorb and release heat during phase transitions, are being enhanced for quicker thermal response and improved stability, making them more effective for managing peak heat loads in applications like data centers and EV batteries. Additionally, advancements in nanotechnology are enhancing the performance of TIMs, allowing for thinner layers that provide superior heat dissipation. These innovations are opening new opportunities across various sectors, including consumer electronics, automotive, and telecommunications, where effective thermal management is increasingly critical. The combined advancements in material performance, efficiency, and sustainability are expected to drive demand and create new avenues for market expansion as industries seek advanced thermal management solutions to support next-generation technologies.

### Market Overview

The automotive sector is a major driver of the Asia Pacific electronic thermal management materials market. The region has seen a rise in automobile production and sales, with vehicle production in Asia-Oceania increasing from 50 million in 2022 to 55.1 million in 2023, according to the OICA. In September 2024, Hyundai Motor Company announced a significant investment of USD 28 million to establish an EV and battery assembly facility in Thailand, highlighting the growing focus on the EV market. Thermal management materials are vital for maintaining battery stability, optimizing performance, and prolonging the lifespan of components in EVs, especially in warmer climates prevalent in Asia. The increasing adoption of EVs is thus a key factor driving the demand for electronic thermal management materials, which are essential for ensuring vehicle safety and efficiency.

## Market Segmentation

The Asia Pacific electronic thermal management materials market is segmented by product type, end-use industry, and country.

**By Product Type:** The market includes conductive adhesives, thermal management films, gap fillers, thermal gels, phase change materials, thermal greases, and others. In 2023, thermal greases held the largest market share.

**By End-Use Industry:** The market is divided into consumer electronics, automotive, aerospace, telecommunications, and others, with the automotive sector leading in market share in 2023.

**By Country:** The market is segmented into Australia, China, India, Japan, South Korea, and the Rest of Asia Pacific, with China holding the largest share in 2023.

## Key Players in the Market

Prominent companies in the electronic thermal management materials market include 3M Co, DuPont de Nemours Inc, Electrolube Ltd, European Thermodynamics Ltd, Graco Inc, Henkel AG & Co KGaA, Honeywell International Inc, Marian Inc, Master Bond Inc, Momentive Performance Materials Inc, Parker Hannifin Corp, Robnor ResinLab Ltd, Sur-Seal Corp, Tecman Speciality Materials Ltd, and Wacker Chemie AG.

## Contents

### **1. INTRODUCTION**

- 1.1 Report Guidance
- 1.2 Market Segmentation

### **2. EXECUTIVE SUMMARY**

- 2.1 Key Insights
- 2.2 Market Attractiveness

### **3. RESEARCH METHODOLOGY**

- 3.1 Secondary Research
- 3.2 Primary Research
  - 3.2.1 Hypothesis formulation:
  - 3.2.2 Macro-economic factor analysis:
  - 3.2.3 Developing base number:
  - 3.2.4 Data Triangulation:
  - 3.2.5 Country level data:

### **4. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET LANDSCAPE**

- 4.1 Overview
- 4.2 Porter's Five Forces Analysis
  - 4.2.1 Threat of New Entrants:
  - 4.2.2 Bargaining Power of Suppliers:
  - 4.2.3 Bargaining Power of Buyers:
  - 4.2.4 Competitive Rivalry:
  - 4.2.5 Threat of Substitutes:
- 4.3 Ecosystem Analysis
  - 4.3.1 Raw Material Suppliers
  - 4.3.2 Manufacturers
  - 4.3.3 Distributors/Suppliers
  - 4.3.4 End-Use Industry

### **5. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET -**

## **KEY MARKET DYNAMICS**

5.1 Asia Pacific Electronic Thermal Management Materials Market - Key Market Dynamics

5.2 Market Drivers

5.2.1 Strong Growth of Electronics and Semiconductor Industry

5.2.2 Rise in Demand from Automotive Industry

5.3 Market Restraints

5.3.1 High Cost and Complex Manufacturing Process

5.4 Market Opportunities

5.4.1 Advancements in Electronic Thermal Management Materials

5.5 Future Trends

5.5.1 Rising Proliferation of 5G Technology

5.6 Impact of Drivers and Restraints:

## **6. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET - ANALYSIS**

6.1 Asia Pacific Electronic Thermal Management Materials Market Revenue (US\$ Million), 2021-2031

6.2 Asia Pacific Electronic Thermal Management Materials Market Forecast Analysis

## **7. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET ANALYSIS - BY PRODUCT TYPE**

7.1 Conductive Adhesives

7.1.1 Overview

7.1.2 Conductive Adhesives: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.2 Thermal Management Films

7.2.1 Overview

7.2.2 Thermal Management Films: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.3 Gap Fillers

7.3.1 Overview

7.3.2 Gap Fillers: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.4 Thermal Gels

7.4.1 Overview

7.4.2 Thermal Gels: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.5 Phase Change Materials

7.5.1 Overview

7.5.2 Phase Change Materials: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.6 Thermal Greases

7.6.1 Overview

7.6.2 Thermal Greases: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

7.7 Others

7.7.1 Overview

7.7.2 Others: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **8. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET ANALYSIS - BY END-USE INDUSTRY**

8.1 Consumer Electronics

8.1.1 Overview

8.1.2 Consumer Electronics: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.2 Automotive

8.2.1 Overview

8.2.2 Automotive: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.3 Aerospace

8.3.1 Overview

8.3.2 Aerospace: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.4 Telecommunication

8.4.1 Overview

8.4.2 Telecommunication: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

8.5 Others

8.5.1 Overview

8.5.2 Others: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

## **9. ASIA PACIFIC ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET - COUNTRY ANALYSIS**

### 9.1 Asia Pacific

#### 9.1.1 Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast Analysis - by Country

##### 9.1.1.1 Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast Analysis - by Country

##### 9.1.1.2 Australia: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

##### 9.1.1.2.1 Australia: Asia Pacific Electronic Thermal Management Materials Market Share - by Product Type

##### 9.1.1.2.2 Australia: Asia Pacific Electronic Thermal Management Materials Market Share - by End-use Industry

##### 9.1.1.3 China: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

##### 9.1.1.3.1 China: Asia Pacific Electronic Thermal Management Materials Market Share - by Product Type

##### 9.1.1.3.2 China: Asia Pacific Electronic Thermal Management Materials Market Share - by End-use Industry

##### 9.1.1.4 India: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

##### 9.1.1.4.1 India: Asia Pacific Electronic Thermal Management Materials Market Share - by Product Type

##### 9.1.1.4.2 India: Asia Pacific Electronic Thermal Management Materials Market Share - by End-use Industry

##### 9.1.1.5 Japan: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

##### 9.1.1.5.1 Japan: Asia Pacific Electronic Thermal Management Materials Market Share - by Product Type

##### 9.1.1.5.2 Japan: Asia Pacific Electronic Thermal Management Materials Market Share - by End-use Industry

##### 9.1.1.6 South Korea: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

##### 9.1.1.6.1 South Korea: Asia Pacific Electronic Thermal Management Materials Market Share - by Product Type

##### 9.1.1.6.2 South Korea: Asia Pacific Electronic Thermal Management Materials Market Share - by End-use Industry

##### 9.1.1.7 Rest of APAC: Asia Pacific Electronic Thermal Management Materials Market

- Revenue and Forecast, 2021-2031 (US\$ Million)

9.1.1.7.1 Rest of APAC: Asia Pacific Electronic Thermal Management Materials  
Market Share - by Product Type

9.1.1.7.2 Rest of APAC: Asia Pacific Electronic Thermal Management Materials  
Market Share - by End-use Industry

## **10. COMPETITIVE LANDSCAPE**

10.1 Heat Map Analysis by Key Players

10.2 Company Positioning and Concentration

## **11. INDUSTRY LANDSCAPE**

11.1 Overview

11.2 Mergers And Acquisitions

11.3 Agreements, Collaborations, And Joint Ventures

11.4 Product Launch

11.5 Expansions and Other Strategic Developments

## **12. COMPANY PROFILES**

12.1 DuPont de Nemours Inc

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 Henkel AG & Co KGaA

12.2.1 Key Facts

12.2.2 Business Description

12.2.3 Products and Services

12.2.4 Financial Overview

12.2.5 SWOT Analysis

12.2.6 Key Developments

12.3 Electrolube Ltd

12.3.1 Key Facts

12.3.2 Business Description

12.3.3 Products and Services

- 12.3.4 Financial Overview
- 12.3.5 SWOT Analysis
- 12.3.6 Key Developments
- 12.4 Tecman Speciality Materials Ltd
  - 12.4.1 Key Facts
  - 12.4.2 Business Description
  - 12.4.3 Products and Services
  - 12.4.4 Financial Overview
  - 12.4.5 SWOT Analysis
  - 12.4.6 Key Developments
- 12.5 Momentive Performance Materials Inc
  - 12.5.1 Key Facts
  - 12.5.2 Business Description
  - 12.5.3 Products and Services
  - 12.5.4 Financial Overview
  - 12.5.5 SWOT Analysis
  - 12.5.6 Key Developments
- 12.6 3M Co
  - 12.6.1 Key Facts
  - 12.6.2 Business Description
  - 12.6.3 Products and Services
  - 12.6.4 Financial Overview
  - 12.6.5 SWOT Analysis
  - 12.6.6 Key Developments
- 12.7 Marian Inc
  - 12.7.1 Key Facts
  - 12.7.2 Business Description
  - 12.7.3 Products and Services
  - 12.7.4 Financial Overview
  - 12.7.5 SWOT Analysis
  - 12.7.6 Key Developments
- 12.8 European Thermodynamics Ltd
  - 12.8.1 Key Facts
  - 12.8.2 Business Description
  - 12.8.3 Products and Services
  - 12.8.4 Financial Overview
  - 12.8.5 SWOT Analysis
  - 12.8.6 Key Developments
- 12.9 Honeywell International Inc

- 12.9.1 Key Facts
- 12.9.2 Business Description
- 12.9.3 Products and Services
- 12.9.4 Financial Overview
- 12.9.5 SWOT Analysis
- 12.9.6 Key Developments
- 12.10 Parker Hannifin Corp
  - 12.10.1 Key Facts
  - 12.10.2 Business Description
  - 12.10.3 Products and Services
  - 12.10.4 Financial Overview
  - 12.10.5 SWOT Analysis
  - 12.10.6 Key Developments
- 12.11 Wacker Chemie AG
  - 12.11.1 Key Facts
  - 12.11.2 Business Description
  - 12.11.3 Products and Services
  - 12.11.4 Financial Overview
  - 12.11.5 SWOT Analysis
  - 12.11.6 Key Developments
- 12.12 Sur-Seal Corp
  - 12.12.1 Key Facts
  - 12.12.2 Business Description
  - 12.12.3 Products and Services
  - 12.12.4 Financial Overview
  - 12.12.5 SWOT Analysis
  - 12.12.6 Key Developments
- 12.13 Graco Inc
  - 12.13.1 Key Facts
  - 12.13.2 Business Description
  - 12.13.3 Products and Services
  - 12.13.4 Financial Overview
  - 12.13.5 SWOT Analysis
  - 12.13.6 Key Developments
- 12.14 Robnor ResinLab Ltd
  - 12.14.1 Key Facts
  - 12.14.2 Business Description
  - 12.14.3 Products and Services
  - 12.14.4 Financial Overview

12.14.5 SWOT Analysis

12.14.6 Key Developments

12.15 Master Bond Inc

12.15.1 Key Facts

12.15.2 Business Description

12.15.3 Products and Services

12.15.4 Financial Overview

12.15.5 SWOT Analysis

12.15.6 Key Developments

## **13. APPENDIX**

13.1 About Us

## List Of Tables

### LIST OF TABLES

Table 1. Asia Pacific Electronic Thermal Management Materials Market Segmentation

Table 2. Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Table 3. Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Product Type

Table 4. Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by End-use Industry

Table 5. Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million) - by Country

Table 6. Australia: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 7. Australia: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 8. China: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 9. China: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 10. India: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 11. India: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 12. Japan: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 13. Japan: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 14. South Korea: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 15. South Korea: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 16. Rest of APAC: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 17. Rest of APAC: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

## List Of Figures

### LIST OF FIGURES

- Figure 1. Asia Pacific Electronic Thermal Management Materials Market Segmentation - Country
- Figure 2. Asia Pacific Electronic Thermal Management Materials Market - Porter's Five Forces Analysis
- Figure 3. Ecosystem: Electronic Thermal Management Materials Market
- Figure 4. Global Electric Car Sales (2016-2023)
- Figure 5. Impact Analysis of Drivers and Restraints
- Figure 6. Asia Pacific Electronic Thermal Management Materials Market Revenue (US\$ Million), 2021-2031
- Figure 7. Asia Pacific Electronic Thermal Management Materials Market Share (%) - by Product Type (2023 and 2031)
- Figure 8. Conductive Adhesives: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 9. Thermal Management Films: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 10. Gap Fillers: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 11. Thermal Gels: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 12. Phase Change Materials: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 13. Thermal Greases: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 14. Others: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 15. Asia Pacific Electronic Thermal Management Materials Market Share (%) - by End-use Industry (2023 and 2031)
- Figure 16. Consumer Electronics: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 17. Automotive: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 18. Aerospace: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)
- Figure 19. Telecommunication: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 20. Others: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021-2031 (US\$ Million)

Figure 21. Asia Pacific Electronic Thermal Management Materials Market Breakdown, by Key Countries, 2023 and 2031 (%)

Figure 22. Australia: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 23. China: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 24. India: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 25. Japan: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 26. South Korea: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 27. Rest of APAC: Asia Pacific Electronic Thermal Management Materials Market - Revenue and Forecast, 2021- 2031 (US\$ Million)

Figure 28. Heat Map Analysis by Key Players

Figure 29. Company Positioning and Concentration

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