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

https://marketpublishers.com/r/E51DE7B472BBEN.html
Date: August 2025
Pages: 175
Price: US$ 3,450.00 (Single User License)
ID: E51DE7B472BBEN

Abstracts

The European electronic thermal management materials market was valued at approximately USD 614.91 million in 2023 and is projected to grow to USD 1,019.76 million by 2031, reflecting a compound annual growth rate (CAGR) of 6.5% during this period.

Growth Driven by Automotive Sector

The automotive industry, particularly the surge in electric vehicles (EVs), autonomous driving technologies, and sophisticated infotainment systems, is a key driver of demand for advanced electronic thermal management materials. As vehicles become more electrified and integrated with complex electronic systems, they generate significant heat due to high-density electronics. Effective thermal management is crucial for ensuring the reliability, performance, and safety of these systems. The increasing dependence on electronics in vehicles has made thermal management materials essential for maintaining optimal temperatures across various components, including batteries, sensors, onboard computers, and inverters.

Electric vehicles have transformed the automotive landscape, presenting new challenges in thermal management. EVs utilize large battery packs that store and supply energy to the vehicle's motor, generating considerable heat during operation. Elevated battery temperatures can lead to performance issues, reduced battery lifespan, and potential safety risks such as thermal runaway. According to the International Energy Agency, global electric car sales reached 13.9 million in 2022, up from over 10 million in 2021. Advanced thermal management materials, including thermal interface materials (TIMs), heat spreaders, and phase-change materials, are

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vital for regulating battery temperatures, ensuring they operate within safe limits, and enhancing overall vehicle efficiency and safety. The demand for fast-charging capabilities further necessitates thermal management solutions that can handle increased heat loads associated with rapid energy transfer.

Impact of Autonomous Driving Technologies

The rise of autonomous driving technology also significantly contributes to the demand for electronic thermal management materials in the automotive sector. Autonomous vehicles rely on a multitude of sensors, cameras, radar, and LiDAR systems to process large amounts of data in real-time. These components, along with the central computing systems that make driving decisions, produce substantial heat that must be effectively managed to maintain performance and prevent overheating. High-performance TIMs and thermal gas fillers are essential for these systems, ensuring reliable operation under various environmental conditions. For autonomous systems to function safely, thermal management materials must provide efficient heat dissipation while ensuring durability and reliability for prolonged use. Thus, the automotive industry's focus on EVs, autonomous technologies, and advanced onboard systems has created a robust demand for electronic thermal management materials, making them a foundational element of modern automotive innovation.

Overview of the European Market

Europe's automotive sector is increasingly pivotal in driving the demand for electronic thermal management materials, especially as the region shifts towards advanced manufacturing and electric vehicle production. The European Commission reports that Europe is among the largest motor vehicle manufacturers globally, with the automotive industry directly and indirectly employing around 13.8 million people, accounting for 6.1% of total employment in the European Union (EU). The Organisation Internationale des Constructeurs d'Automobiles (OICA) noted that EU automotive production rose to 4.2 million units in 2023, up from 3.7 million in 2022, marking a 19% increase. Major automotive players in the region, such as Volkswagen AG, Stellantis NV, and Mercedes-Benz Group AG, are heavily investing in EV production. For instance, Stellantis and Mercedes-Benz announced plans in February 2024 to invest USD 7.6 billion in three new EV gigafactories across the EU, located in Germany, Italy, and France. Europe’s ambitious climate goals aimed at reducing greenhouse gas emissions are further propelling growth in EV and battery production, where thermal management materials are crucial for ensuring battery efficiency, safety, and longevity.

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Market Segmentation

The European 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 dominating in 2023.

By Country: The market is segmented into Germany, France, Italy, the UK, Russia, and the Rest of Europe, with Germany holding the largest share in 2023.

Key Players in the Market

Leading 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.

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Contents

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8. EUROPE ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET ANALYSIS - BY END-USE INDUSTRY

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9. EUROPE ELECTRONIC THERMAL MANAGEMENT MATERIALS MARKET - COUNTRY ANALYSIS

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13. APPENDIX

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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