

Global Thermal Management Integrated Modules (TMIM) for EVs Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Thermal Management Integrated Modules (TMIM) for EVs competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. As the automotive industry moves toward electrification and intelligent driving, the complexity of vehicle energy management is increasing, and the requirements for vehicle energy management systems are also increasing. To more effectively meet the needs of future electric vehicles, integrated thermal management systems have become a clear trend. The advantage of integration is that the product is more compact, which can simplify the vehicle's space layout, reduce piping layout, reduce costs, and reduce volume and weight. The thermal management integrated module is the core component of integrated thermal management in electric vehicles. By integrating components such as the water-cooled condenser, battery chiller, electronic water pump, electronic water valve, refrigerant integrated channel, water tank and water channel, liquid accumulator, gas-liquid separator, etc. (customized according to different user needs) into a single module, it achieves more precise temperature control and better heat distribution, ultimately improving vehicle performance. In 2024, global production reached approximately 5,523.15 K units, with an average global market price of around US\$ 274 per unit. The core upstream components of Thermal Management Integrated Modules include electronic control components such as electronic water valves, electronic water pumps, shut-off valves, and electronic expansion valves; mechanical components such as heat exchangers, manifolds, and gas-liquid separators; and control components such as controllers. Major raw material suppliers include Denso, Valeo, MAHLE, Bosch, Sanhua, Yinlun, and Ningbo Tuopu Group. Downstream applications include thermal

management for pure electric vehicles and plug-in hybrid vehicles, with typical customers including Tesla, BYD, NIO, Li Auto, and Xpeng, etc. The annual production capacity of a single Thermal Management Integrated Modules line typically ranges from 100,000 to 300,000 units, with significant variations depending on the scale and technical level of the production line. Gross profit margins generally range from 20% to 30%, and the gross profit margins of different companies' products are significantly affected by product complexity and raw material prices. By 2024, global electric vehicle sales will reach 17 million units, a year-on-year increase of approximately 25%, accounting for over 20% of the global auto market for the first time. In the first quarter of 2025, global electric vehicle sales will have increased by 35% year-on-year. China will continue to lead the market, with electric vehicle sales exceeding 11 million units in 2024, accounting for nearly half of domestic new car sales. The Chinese market's growth momentum remains strong heading into 2025. According to data released by the China Association of Automobile Manufacturers, in the first quarter of 2025, China's cumulative production and sales of new energy vehicles reached 3.182 million and 3.075 million units, respectively, representing significant year-on-year increases of 50.4% and 47.1%, respectively. New energy vehicle sales will account for 41.2% of total new car sales. As the penetration rate of new energy vehicles continues to rise, traditional automakers are accelerating their electrification transformation. Some are collaborating with technology companies to jointly develop new energy vehicle technologies and enhance the intelligence of their products. Others are increasing investment in infrastructure such as charging stations to provide consumers with more convenient charging services. The electrification transformation of traditional automakers will not only enhance their competitiveness but also drive the entire automotive industry towards a more environmentally friendly and intelligent future. With the rapid global penetration of new energy vehicles, market demand for Thermal Management Integrated Modules (TMIM), core components that ensure battery safety and optimize driving range, is growing steadily. Pure electric vehicles rely far more heavily on precise temperature control than traditional fuel-powered vehicles, while the complex heat source management requirements of plug-in hybrid vehicles are further driving the adoption of integrated solutions. Whether it's intelligent heat pump systems for high-end models or low-cost liquid cooling solutions for economy cars, Thermal Management Integrated Modules (TMIM) have become an indispensable component of new energy vehicles. Currently, the global Thermal Management Integrated Modules (TMIM) market is primarily dominated by Chinese manufacturers such as Sanhua, Ningbo Tuopu Group, and Yinlun. In recent years, European manufacturers such as Mahle GmbH, Valeo, and Marelli have successively stepped up their efforts, gradually changing the market competition landscape. Riding the wave of new energy, China has attracted a large number of emerging players to enter the Thermal Management

Integrated Modules (TMIM) field. Many of these companies have obtained project contracts from OEMs and are expected to achieve mass production within the next 1-2 years. By then, a competitive landscape will present a hundred schools of thought contending and a hundred flowers blooming.

The global Thermal Management Integrated Modules (TMIM) for EVs market size was estimated at USD 1513.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 13.90% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Thermal Management Integrated Modules (TMIM) for EVs market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Thermal Management Integrated Modules (TMIM) for EVs market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Thermal Management Integrated Modules (TMIM) for EVs market.

Global Thermal Management Integrated Modules (TMIM) for EVs Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Mahle GmbH

Valeo

Hanon Systems

HYUNDAI WIA

Denso Corporation

Marelli

Sanhua

Ningbo Tuopu Group

Yinlun

Songz Automobile Air Conditioning

Changzhou Tenglong Auto Parts

Jiangsu Chaoli Electric Manufacture

Xiezhong International Thermal Management System

Huayu Automotive Systems

Mande Electronics

Feilong Automotive Parts

United Automotive Electronic System

Shanghai Highly

Shanghai Dachuang Automotive Technology

Yuxin Automotive Thermal Management Technologies

Tianjin Pengling Group

Yapp Automotive Systems

PXI AUTO COMPONENTS

Longquan Xiazhi Thermal Management System

Hangzhou Lingdong Automotive Thermal Management Technology

Market Segmentation (by Type)

Refrigerant Integrated Module

Coolant Integrated Module

Comprehensive Integrated Module

Market Segmentation (by Application)

BEV
PHEV

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the Thermal Management Integrated Modules (TMIM) for EVs Market

Overview of the regional outlook of the Thermal Management Integrated Modules (TMIM) for EVs Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Thermal Management Integrated Modules (TMIM) for EVs Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Thermal Management Integrated Modules (TMIM) for EVs, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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