

Global Thermal Management Integrated Modules (TMIM) 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) competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Thermal Management Integrated Modules (TMIMs) are advanced systems designed to efficiently manage the thermal needs of various components within a vehicle, particularly in electric and hybrid vehicles. These modules integrate multiple thermal management functions into a single, compact system, optimizing the vehicle's performance, safety, and energy efficiency. In 2024, global electric vehicle sales will reach 17 million, an increase of about 25% year-on-year, accounting for more than 20% of the global automobile market for the first time; in the first quarter of 2025, global electric vehicle sales will increase by 35% year-on-year. The Chinese market continues to lead, with electric vehicle sales exceeding 11 million in 2024, accounting for nearly half of domestic new car sales. Entering 2025, the growth momentum of the Chinese market remains strong. According to data released by the China Association of Automobile Manufacturers, in the first quarter of 2025, China's electric vehicle production and sales will reach 3.182 million and 3.075 million respectively, a significant increase of 50.4% and 47.1% year-on-year respectively, and the sales of new electric vehicles will account for 41.2% of the total sales of new vehicles. With the continuous improvement of the penetration rate of electric vehicles, the pace of electrification transformation of traditional car companies has also been accelerating. Some traditional car companies have cooperated with technology companies to jointly develop electric vehicle technology and improve the level of product intelligence. The electrification transformation of traditional car companies will not only help improve their own competitiveness, but will also drive the entire

automotive industry to develop in a more environmentally friendly and intelligent direction. Compared with traditional fuel vehicles, the main difference of electric vehicles is that the fuel engine system is replaced by three electric components (battery, motor, and electronic control), and the corresponding engine cooling system is changed to power battery thermal management and motor electronic control cooling system. Although the original automobile air conditioning system is retained, the original energy source engine is lost, so its main components have also changed significantly. The electric vehicle thermal management system consists of three parts: cabin thermal management (heating and cooling), battery system thermal management (heating and cooling), and motor electronic control cooling system. In the early days, due to the limitations of the electric vehicle oil-to-electric architecture and the insufficient integration capabilities of component suppliers, the subsystems of electric vehicle thermal management generally adopted a decentralized architecture. The decentralized thermal management system has high costs due to redundant components and pipelines, and it is impossible to coordinate the thermal management of the entire vehicle in a unified manner, which has low efficiency, resulting in the waste heat of batteries and motors not being effectively utilized. From the perspective of system architecture, electric vehicle thermal management has developed from decentralized operation of each subsystem to integrated operation. The integrated thermal management system can recycle the waste heat of the three electrics to reduce energy consumption and improve the performance of the heat pump. Since the heat pump system has poor performance in low-temperature scenarios, if the waste heat of the battery and motor can be recycled, its performance can be improved without increasing energy consumption. Tesla is the pioneer of highly integrated thermal management systems, and has now evolved to the fourth generation of products. After Tesla integrated the module, companies including BYD, Huawei, and Ideal have launched their own thermal management integrated solutions. Currently, the global Thermal Management Integrated Modules (TMIM) manufacturers mainly include Sanhua, Ningbo Tuopu Group, Yinlun, Valeo, Mahle GmbH, Hanon Systems, HYUNDAI WIA, Songz Automobile Air Conditioning, Changzhou Tenglong Auto Parts, Jiangsu Chaoli Electric Manufacture, etc. In 2024, the top five global manufacturers will account for more than 80% of the market share. Despite the high market concentration, other manufacturers such as Denso Corporation, Aisin, Xiezhong International Thermal Management System, Mande Electronics, Feilong Automotive Parts, United Automotive Electronic System, Shanghai Highly, Yuxin Automotive Thermal Management Technologies, Tianjin Pengling Group, Hangzhou Lingdong Automotive Thermal Management Technology, Longquan Xiazhi Thermal Management System, Yapp Automotive Systems, PXI AUTO COMPONENTS, Shanghai Dachuang Automotive Technology, etc. are also accelerating the layout of Thermal Management Integrated Modules

(TMIM) related products, and industry competition will be more intense in the future. Thermal Management Integrated Modules (TMIM) are mainly divided into three types: Refrigerant Integrated Module, Coolant Integrated Module and Comprehensive Integrated Module. The penetration rate of these modules is increasing rapidly. According to our data, in 2024, the global Comprehensive Integrated Module accounts for 46% of the total thermal management integrated modules. From a regional perspective, Greater China is the largest market and will continue to lead. The demand for Thermal Management Integrated Modules (TMIM) in the Asia-Pacific region will increase from 5.23 million units in 2024 to 18.90 million units in 2031. Most mainland China automakers, such as BYD, Geely, NIO and Xiaopeng Motors, have deployed Thermal Management Integrated Modules (TMIM) in their existing electric vehicle models. In addition, we predict that the demand for Thermal Management Integrated Modules (TMIM) in Europe and America will continue to grow steadily from 2025 to 2031. In the future, the integrated thermal management system must not only be able to achieve collaborative work among subsystems through a unified control system to improve thermal management efficiency, but also meet the diverse demands of electric vehicle products for high integration, thermal damage control, remote control, environmentally friendly working fluids, temperature control that adapts to high-voltage fast charging and intelligent applications, etc. Although integration is the general trend, the specific integration method, functional configuration, scalability of the thermal management module, and the most important balance between efficiency and cost, etc., still need to be tested in practice.

The global Thermal Management Integrated Modules (TMIM) market size was estimated at USD 1375.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 14.00% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Thermal Management Integrated Modules (TMIM) 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) 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) market.

Global Thermal Management Integrated Modules (TMIM) 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

Sanhua
Ningbo Tuopu Group
Yinlun
Valeo
Mahle GmbH
Hanon Systems
HYUNDAI WIA
Songz Automobile Air Conditioning
Changzhou Tenglong Auto Parts
Jiangsu Chaoli Electric Manufacture
Denso Corporation
Aisin

Xiezhong International Thermal Management System
Mande Electronics
Feilong Automotive Parts
United Automotive Electronic System
Shanghai Highly
Yuxin Automotive Thermal Management Technologies
Tianjin Pengling Group
Hangzhou Lingdong Automotive Thermal Management Technology
Longquan Xiazhi Thermal Management System
Yapp Automotive Systems
PXI AUTO COMPONENTS
Shanghai Dachuang Automotive 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) Market
Overview of the regional outlook of the Thermal Management Integrated Modules (TMIM) 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) 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), 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

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

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