

# Global Precious Metals for Automotive Market 2023

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## Abstracts

The battery thermal management system market for mobility and consumer electronics was valued at \$5.38 billion in 2022 and is projected to reach \$17.36 billion by 2029, growing at a CAGR of 17.5%. This growth is driven by increasing global demand for electric vehicles. Battery thermal management systems regulate heat dissipation to ensure efficient and safe battery usage. They are crucial for maintaining energy storage capacity, extending cell lifespan, ensuring system safety, and maximizing driving range. The market is still in development, with demand for lithium-ion batteries driving growth. However, the lack of standardized processes for consumer electronics systems hinders market expansion. The COVID-19 pandemic impacted the market, but it is expected to regain momentum as operations resume.

### Market Segmentation

The market is segmented based on various factors, including type, technology, battery type, application, and region.

#### Segmentation by Type

Active

Passive

Hybrid

#### Segmentation by Technology

Air Cooling and Heating

Liquid Cooling and Heating

Refrigerant Cooling and Heating

Other Technologies

#### Segmentation by Battery Type

Conventional Batteries

## Solid-State Batteries

### Segmentation by Application

Mobility - Passenger Vehicles and Commercial Vehicles

Consumer Electronics - Mobile Phones, Laptops and Tablets, Wearables, and Others

### Segmentation by Region

North America - U.S., Canada, and Mexico

Europe - Germany, France, Italy, Spain, and Rest-of-Europe

China

U.K.

Asia-Pacific and Japan - Japan, South Korea, India, Australia, and Rest-of-Asia-Pacific and Japan

Rest-of-the-World - Middle East and Africa and South America

In 2022, the battery thermal management system market for mobility and consumer electronics was driven by several factors. The dominant application was the mobility segment, fueled by the growing global sales of electric vehicles. Battery thermal management systems are essential for maintaining optimal battery temperature, ensuring safety, and promoting heat dissipation. The active segment led the market, driven by demand from the automotive and consumer electronics industries, where temperature control is critical for battery efficiency. The adoption of active battery thermal management systems increased due to the attraction of cell immersion by industrialists. Liquid cooling and heating technology held the largest market share in 2022, utilizing pumped liquid to dissipate thermal energy within battery packs. This technology provides superior thermal enforcement capabilities for rectangular prismatic and pouch cells.

Conventional batteries, including lead-acid, nickel-based, and lithium-ion batteries, were dominant in the 2022 market. These batteries are widely used in electric vehicles due to their accessibility and cost-effectiveness. The increasing demand for lithium-ion batteries, specifically, contributed to the dominance of conventional batteries, a trend expected to continue from 2023 to 2029. China emerged as the dominant region in the battery thermal management system market, driven by its thriving electric vehicle industry, presence of key players in the supply chain, and rapid economic growth. China also has significant reserves of lithium-ion, providing ample opportunities for utilization across industries. Additionally, Australia and Singapore have emerged as major maintenance, repair, and operations destinations, along with potential growth in the automotive aftermarket, further contributing to the region's success.

### Competitive Landscape

The selection of profiled companies was based on inputs from primary experts and an analysis of their company coverage, product portfolio, and market penetration. Key companies profiled in this report include 3M, Robert Bosch GmbH, Valeo, Mahle GmbH, SAMSUNG SDI CO., LTD., BorgWarner Inc., VOSS Automotive GmbH, Denso Corporation, Hanon Systems, Grayson Thermal Systems, Polymer Science, Inc., LG Chem., Gentherm Incorporated, Continental AG, Calogy Solutions, Carrar, and Amionx.

### Recent Industry Developments

In February 2021, Mahle GmbH acquired Keihin Corporation's thermal management business in key locations, expanding its global presence and strengthening its position in the market.

In March 2022, Hanon Systems demonstrated its commitment to growth and innovation by establishing a state-of-the-art facility in Hubei, China. This facility focuses on the development of advanced HVAC modules for electric vehicles.

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