

# Global Automotive Holistic Thermal Management Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Automotive Holistic Thermal Management market size was valued at US\$ 64660 million in 2025 and is forecast to a readjusted size of US\$ 101170 million by 2032 with a CAGR of 6.7% during review period.

Automotive holistic thermal management is the integrated architecture and control strategy that manage heat generation, transfer and rejection across all heat-relevant subsystems of a vehicle, including the engine or e-powertrain, battery pack, transmission, power electronics, HVAC/heat pump, on-board charger and the cabin. By coordinating coolant, lubricant, refrigerant and air circuits with pumps, valves, heat exchangers, compressors, fans, sensors and dedicated control units, the system orchestrates warm-up, cooling and waste-heat utilization so that each component operates within its optimal temperature range, balancing performance, safety, energy efficiency/range and occupant comfort under diverse operating and climate conditions.

Automotive holistic thermal management is the system-level discipline of controlling how heat is generated, transferred, stored and dissipated across the entire vehicle. It directly shapes fuel or energy consumption, driving range, performance, durability and cabin comfort in all powertrain types—internal combustion, hybrid, battery electric and fuel cell. Modern thermal management is no longer just “engine cooling plus A/C”; it is a multi-loop architecture covering engine or fuel cell, transmission or e-axle, battery, power electronics, cabin HVAC and even charging-related heat flows. The goal is to keep every key component in its optimal temperature window under real-world conditions, while consuming as little energy as possible.

On the technology side, automotive thermal management brings together multiple subsystems into one coordinated architecture. In fuel and hybrid vehicles, it focuses on fast warm-up, precise coolant and oil temperature control, efficient charge-air and EGR cooling, and stable exhaust temperatures for aftertreatment efficiency and emissions compliance. In battery electric and fuel cell vehicles, the center of gravity shifts to battery thermal management, e-motor and inverter cooling, and high-efficiency HVAC and heat pump systems that must perform in both hot and cold climates without compromising range or fast-charging performance. Underneath sit radiators, condensers, evaporators, chillers, cold plates, heat pumps, electric pumps and compressors, valve blocks, fans and dedicated coolants and refrigerants, all tied together by dense sensor networks and thermal controllers running real-time control algorithms.

From an industry perspective, automotive thermal management is evolving from a low-visibility component area into a strategic lever for OEM differentiation and total cost of ownership. Stricter CO<sub>2</sub> and pollutant regulations, tougher energy-consumption and range targets, and user expectations around fast charging and all-climate comfort push automakers to “mine” every available percent of efficiency through smarter thermal design. Leading OEMs and Tier-1 suppliers are moving from buying standalone radiators, pumps and HVAC units toward co-developing integrated thermal solutions—front-end cooling modules, heat pump units, battery thermal systems and associated control software—validated at the vehicle-platform level. In a world of software-defined vehicles and over-the-air updates, thermal management is shifting from a one-time hardware decision to a core, continuously optimizable system that supports performance, comfort and brand positioning over the full vehicle life.

This report is a detailed and comprehensive analysis for global Automotive Holistic Thermal Management market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### **Key Features:**

Global Automotive Holistic Thermal Management market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Automotive Holistic Thermal Management market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Automotive Holistic Thermal Management market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Automotive Holistic Thermal Management market shares of main players, in revenue (\$ Million), 2021-2026

### **The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive Holistic Thermal Management

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Holistic Thermal Management market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include DENSO, Hanon Systems, Valeo, MAHLE GmbH, Sanhua Intelligent Controls, Sanden, Aotecar, Yinlun Machinery, HASCO, Songz Automobile Air Conditioning, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### Market segmentation

Automotive Holistic Thermal Management market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Powertrain System

Passenger Cabin Thermal Management System

Motor Control Thermal Management System

## Battery Thermal Management System

### Market segment by Sales Channel

OEM

Aftermarket

### Market segment by System Architecture

Split Type

Integrated Type

### Market segment by Vehicle Power Source

Internal Combustion Engines

New Energy Vehicles

### Market segment by Application

Passenger Cars

Commercial Vehicles

### Market segment by players, this report covers

DENSO

Hanon Systems

Valeo

MAHLE GmbH

Sanhua Intelligent Controls

Sanden

Aotecar

Yinlun Machinery

HASCO

Songz Automobile Air Conditioning

Tuopu Group

Zhongding Group

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

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

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

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 13 chapters:**

Chapter 1, to describe Automotive Holistic Thermal Management product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Automotive Holistic Thermal Management, with

revenue, gross margin, and global market share of Automotive Holistic Thermal Management from 2021 to 2026.

Chapter 3, the Automotive Holistic Thermal Management competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Automotive Holistic Thermal Management market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Automotive Holistic Thermal Management.

Chapter 13, to describe Automotive Holistic Thermal Management research findings and conclusion.

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