

Global Automotive Thermal Management Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Thermal Management market size is expected to reach \$ 101170 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Automotive thermal management refers to a set of systems and technologies used to control the temperature of various vehicle components such as engines, batteries, power electronics, passenger cabins, and drivetrain systems. With the rapid electrification of vehicles and growing demand for fuel efficiency and safety, thermal management systems have become critical in modern automotive design.

Traditionally focused on internal combustion engines (ICE), thermal management now plays an even more vital role in electric vehicles (EVs) and hybrid electric vehicles (HEVs), where batteries and power electronics require precise temperature regulation to ensure performance, safety, and lifespan. Key components include radiators, coolant pumps, electric fans, HVAC systems, battery cooling modules, and thermal interface materials.

The automotive thermal management industry is rapidly transitioning from component-level optimization to system-level coordination and intelligent energy management. On one hand, as the penetration of new energy vehicles continues to rise, thermal management is no longer limited to traditional engine cooling and HVAC systems. It now encompasses multi-loop coordinated control involving the battery, electric drive, power electronics, and cabin, driving the accelerated adoption of technologies such as heat pump systems, direct refrigerant cooling for batteries, oil-cooled e-axes, and SiC-based power electronics thermal dissipation. On the other hand, emerging demands from fast charging, extreme climate adaptability, and comfort-energy trade-offs are

placing higher requirements on system response speed, energy efficiency, and smart control capabilities.

From a product perspective, traditional and hybrid platforms remain the core of the global powertrain thermal systems market. Mechanical pumps and wax valves are being rapidly replaced by electronic water pumps, electrically actuated valves, and integrated cooling modules. Passenger cabin thermal systems are evolving from conventional HVAC to pre-integrated heat pump solutions featuring electric compressors and multi-way valves. Driven by 400V/800V high-voltage systems and high power density, motor and inverter thermal solutions are advancing toward high-efficiency cooling plates and two-phase flow. The battery thermal management system (BTMS) shows the fastest growth, progressing from water-cooled plates to direct refrigerant and high-efficiency microchannel cooling.

From an application standpoint, passenger vehicles dominate the thermal management market, accounting for 76.15% in 2024. The architecture is evolving from “AC + engine cooling” to an integrated approach combining heat pump, electric compressor, electronic valves, and chiller/cold plate systems. In winter, heat pumps and PTC heaters ensure cabin heating and defogging; in summer, high-efficiency heat exchangers and EEVs improve cooling performance and reduce refrigerant usage. For BEVs and PHEVs, thermal management also extends to battery, motor, and inverter systems. These are interconnected through intermediate heat exchangers, enabling pre-conditioning before fast charging, temperature balancing during driving, and thermal derating suppression during high loads—resulting in optimized synergy between passenger comfort, drivetrain efficiency, and range performance.

Globally, the thermal management market is led by manufacturers in China and Europe. Key global players include DENSO, Hanon Systems, Valeo, and MAHLE GmbH, with the top four holding a combined market share of approximately 47.70%. The market is expected to continue evolving toward greater integration, energy efficiency, and intelligent control, with system-level collaboration becoming a key competitive differentiator in the era of vehicle electrification and intelligence.

This report studies the global Automotive Thermal Management demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Thermal Management, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Thermal

Management that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Thermal Management total market, 2021-2032, (USD Million)

Global Automotive Thermal Management total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Automotive Thermal Management total market, key domestic companies, and share, (USD Million)

Global Automotive Thermal Management revenue by player, revenue and market share 2021-2026, (USD Million)

Global Automotive Thermal Management total market by Type, CAGR, 2021-2032, (USD Million)

Global Automotive Thermal Management total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Automotive 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, Bosch, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Automotive Thermal Management market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Thermal Management Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Thermal Management Market, Segmentation by Type:

Powertrain System

Passenger Cabin Thermal Management System

Motor Control Thermal Management System

Battery Thermal Management System

Global Automotive Thermal Management Market, Segmentation by Vehicle Power Source:

Internal Combustion Engines

New Energy Vehicles

Global Automotive Thermal Management Market, Segmentation by Sales Channel:

OEM

Aftermarket

Global Automotive Thermal Management Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

DENSO

Hanon Systems

Valeo

MAHLE GmbH

Sanhua Intelligent Controls

Sanden

Aotecar

Yinlun Machinery

HASCO

Bosch

Johnson Electric

Highly Group

BorgWarner

Zhongding Group

Dana Incorporated

Songz Automobile Air Conditioning

Modine

Feilong Auto Components

Tenglong Auto Parts

Tuopu Group

Key Questions Answered

1. How big is the global Automotive Thermal Management market?
2. What is the demand of the global Automotive Thermal Management market?
3. What is the year over year growth of the global Automotive Thermal Management market?
4. What is the total value of the global Automotive Thermal Management market?
5. Who are the Major Players in the global Automotive Thermal Management market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Automotive Thermal Management Introduction
- 1.2 World Automotive Thermal Management Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Automotive Thermal Management Total Market by Region (by Headquarter Location)
 - 1.3.1 World Automotive Thermal Management Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.3 China Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.4 Europe Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.5 Japan Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Automotive Thermal Management Revenue (2021-2032)
 - 1.3.8 India Based Company Automotive Thermal Management Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Automotive Thermal Management Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Automotive Thermal Management Consumption Value (2021-2032)
- 2.2 World Automotive Thermal Management Consumption Value by Region
 - 2.2.1 World Automotive Thermal Management Consumption Value by Region (2021-2026)
 - 2.2.2 World Automotive Thermal Management Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Automotive Thermal Management Consumption Value (2021-2032)
- 2.4 China Automotive Thermal Management Consumption Value (2021-2032)
- 2.5 Europe Automotive Thermal Management Consumption Value (2021-2032)
- 2.6 Japan Automotive Thermal Management Consumption Value (2021-2032)

- 2.7 South Korea Automotive Thermal Management Consumption Value (2021-2032)
- 2.8 ASEAN Automotive Thermal Management Consumption Value (2021-2032)
- 2.9 India Automotive Thermal Management Consumption Value (2021-2032)

3 WORLD AUTOMOTIVE THERMAL MANAGEMENT COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Automotive Thermal Management Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global Automotive Thermal Management Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for Automotive Thermal Management in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for Automotive Thermal Management in 2025
- 3.3 Automotive Thermal Management Company Evaluation Quadrant
- 3.4 Automotive Thermal Management Market: Overall Company Footprint Analysis
 - 3.4.1 Automotive Thermal Management Market: Region Footprint
 - 3.4.2 Automotive Thermal Management Market: Company Product Type Footprint
 - 3.4.3 Automotive Thermal Management Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: Automotive Thermal Management Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: Automotive Thermal Management Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: Automotive Thermal Management Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Automotive Thermal Management Consumption Value Comparison
 - 4.2.1 United States VS China: Automotive Thermal Management Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Automotive Thermal Management Consumption Value Market Share Comparison (2021 & 2025 & 2032)

4.3 United States Based Automotive Thermal Management Companies and Market Share, 2021-2026

4.3.1 United States Based Automotive Thermal Management Companies, Headquarters (States, Country)

4.3.2 United States Based Companies Automotive Thermal Management Revenue, (2021-2026)

4.4 China Based Companies Automotive Thermal Management Revenue and Market Share, 2021-2026

4.4.1 China Based Automotive Thermal Management Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Automotive Thermal Management Revenue, (2021-2026)

4.5 Rest of World Based Automotive Thermal Management Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Automotive Thermal Management Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Automotive Thermal Management Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Automotive Thermal Management Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Powertrain System

5.2.2 Passenger Cabin Thermal Management System

5.2.3 Motor Control Thermal Management System

5.2.4 Battery Thermal Management System

5.3 Market Segment by Type

5.3.1 World Automotive Thermal Management Market Size by Type (2021-2026)

5.3.2 World Automotive Thermal Management Market Size by Type (2027-2032)

5.3.3 World Automotive Thermal Management Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY VEHICLE POWER SOURCE

6.1 World Automotive Thermal Management Market Size Overview by Vehicle Power Source: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Vehicle Power Source

- 6.2.1 Internal Combustion Engines
- 6.2.2 New Energy Vehicles
- 6.3 Market Segment by Vehicle Power Source
 - 6.3.1 World Automotive Thermal Management Market Size by Vehicle Power Source (2021-2026)
 - 6.3.2 World Automotive Thermal Management Market Size by Vehicle Power Source (2027-2032)
 - 6.3.3 World Automotive Thermal Management Market Size Market Share by Vehicle Power Source (2027-2032)

7 MARKET ANALYSIS BY SALES CHANNEL

- 7.1 World Automotive Thermal Management Market Size Overview by Sales Channel: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Sales Channel
 - 7.2.1 OEM
 - 7.2.2 Aftermarket
- 7.3 Market Segment by Sales Channel
 - 7.3.1 World Automotive Thermal Management Market Size by Sales Channel (2021-2026)
 - 7.3.2 World Automotive Thermal Management Market Size by Sales Channel (2027-2032)
 - 7.3.3 World Automotive Thermal Management Market Size Market Share by Sales Channel (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

- 8.1 World Automotive Thermal Management Market Size Overview by Application: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Application
 - 8.2.1 Passenger Car
 - 8.2.2 Commercial Vehicle
- 8.3 Market Segment by Application
 - 8.3.1 World Automotive Thermal Management Market Size by Application (2021-2026)
 - 8.3.2 World Automotive Thermal Management Market Size by Application (2027-2032)
 - 8.3.3 World Automotive Thermal Management Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 DENSO

9.1.1 DENSO Details

9.1.2 DENSO Major Business

9.1.3 DENSO Automotive Thermal Management Product and Services

9.1.4 DENSO Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 DENSO Recent Developments/Updates

9.1.6 DENSO Competitive Strengths & Weaknesses

9.2 Hanon Systems

9.2.1 Hanon Systems Details

9.2.2 Hanon Systems Major Business

9.2.3 Hanon Systems Automotive Thermal Management Product and Services

9.2.4 Hanon Systems Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Hanon Systems Recent Developments/Updates

9.2.6 Hanon Systems Competitive Strengths & Weaknesses

9.3 Valeo

9.3.1 Valeo Details

9.3.2 Valeo Major Business

9.3.3 Valeo Automotive Thermal Management Product and Services

9.3.4 Valeo Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 Valeo Recent Developments/Updates

9.3.6 Valeo Competitive Strengths & Weaknesses

9.4 MAHLE GmbH

9.4.1 MAHLE GmbH Details

9.4.2 MAHLE GmbH Major Business

9.4.3 MAHLE GmbH Automotive Thermal Management Product and Services

9.4.4 MAHLE GmbH Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 MAHLE GmbH Recent Developments/Updates

9.4.6 MAHLE GmbH Competitive Strengths & Weaknesses

9.5 Sanhua Intelligent Controls

9.5.1 Sanhua Intelligent Controls Details

9.5.2 Sanhua Intelligent Controls Major Business

9.5.3 Sanhua Intelligent Controls Automotive Thermal Management Product and Services

9.5.4 Sanhua Intelligent Controls Automotive Thermal Management Revenue, Gross

Margin and Market Share (2021-2026)

9.5.5 Sanhua Intelligent Controls Recent Developments/Updates

9.5.6 Sanhua Intelligent Controls Competitive Strengths & Weaknesses

9.6 Sanden

9.6.1 Sanden Details

9.6.2 Sanden Major Business

9.6.3 Sanden Automotive Thermal Management Product and Services

9.6.4 Sanden Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Sanden Recent Developments/Updates

9.6.6 Sanden Competitive Strengths & Weaknesses

9.7 Aotecar

9.7.1 Aotecar Details

9.7.2 Aotecar Major Business

9.7.3 Aotecar Automotive Thermal Management Product and Services

9.7.4 Aotecar Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.7.5 Aotecar Recent Developments/Updates

9.7.6 Aotecar Competitive Strengths & Weaknesses

9.8 Yinlun Machinery

9.8.1 Yinlun Machinery Details

9.8.2 Yinlun Machinery Major Business

9.8.3 Yinlun Machinery Automotive Thermal Management Product and Services

9.8.4 Yinlun Machinery Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.8.5 Yinlun Machinery Recent Developments/Updates

9.8.6 Yinlun Machinery Competitive Strengths & Weaknesses

9.9 HASCO

9.9.1 HASCO Details

9.9.2 HASCO Major Business

9.9.3 HASCO Automotive Thermal Management Product and Services

9.9.4 HASCO Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.9.5 HASCO Recent Developments/Updates

9.9.6 HASCO Competitive Strengths & Weaknesses

9.10 Bosch

9.10.1 Bosch Details

9.10.2 Bosch Major Business

9.10.3 Bosch Automotive Thermal Management Product and Services

9.10.4 Bosch Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Bosch Recent Developments/Updates

9.10.6 Bosch Competitive Strengths & Weaknesses

9.11 Johnson Electric

9.11.1 Johnson Electric Details

9.11.2 Johnson Electric Major Business

9.11.3 Johnson Electric Automotive Thermal Management Product and Services

9.11.4 Johnson Electric Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.11.5 Johnson Electric Recent Developments/Updates

9.11.6 Johnson Electric Competitive Strengths & Weaknesses

9.12 Highly Group

9.12.1 Highly Group Details

9.12.2 Highly Group Major Business

9.12.3 Highly Group Automotive Thermal Management Product and Services

9.12.4 Highly Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.12.5 Highly Group Recent Developments/Updates

9.12.6 Highly Group Competitive Strengths & Weaknesses

9.13 BorgWarner

9.13.1 BorgWarner Details

9.13.2 BorgWarner Major Business

9.13.3 BorgWarner Automotive Thermal Management Product and Services

9.13.4 BorgWarner Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.13.5 BorgWarner Recent Developments/Updates

9.13.6 BorgWarner Competitive Strengths & Weaknesses

9.14 Zhongding Group

9.14.1 Zhongding Group Details

9.14.2 Zhongding Group Major Business

9.14.3 Zhongding Group Automotive Thermal Management Product and Services

9.14.4 Zhongding Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.14.5 Zhongding Group Recent Developments/Updates

9.14.6 Zhongding Group Competitive Strengths & Weaknesses

9.15 Dana Incorporated

9.15.1 Dana Incorporated Details

9.15.2 Dana Incorporated Major Business

- 9.15.3 Dana Incorporated Automotive Thermal Management Product and Services
- 9.15.4 Dana Incorporated Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 9.15.5 Dana Incorporated Recent Developments/Updates
- 9.15.6 Dana Incorporated Competitive Strengths & Weaknesses
- 9.16 Songz Automobile Air Conditioning
 - 9.16.1 Songz Automobile Air Conditioning Details
 - 9.16.2 Songz Automobile Air Conditioning Major Business
 - 9.16.3 Songz Automobile Air Conditioning Automotive Thermal Management Product and Services
 - 9.16.4 Songz Automobile Air Conditioning Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Songz Automobile Air Conditioning Recent Developments/Updates
 - 9.16.6 Songz Automobile Air Conditioning Competitive Strengths & Weaknesses
- 9.17 Modine
 - 9.17.1 Modine Details
 - 9.17.2 Modine Major Business
 - 9.17.3 Modine Automotive Thermal Management Product and Services
 - 9.17.4 Modine Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Modine Recent Developments/Updates
 - 9.17.6 Modine Competitive Strengths & Weaknesses
- 9.18 Feilong Auto Components
 - 9.18.1 Feilong Auto Components Details
 - 9.18.2 Feilong Auto Components Major Business
 - 9.18.3 Feilong Auto Components Automotive Thermal Management Product and Services
 - 9.18.4 Feilong Auto Components Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Feilong Auto Components Recent Developments/Updates
 - 9.18.6 Feilong Auto Components Competitive Strengths & Weaknesses
- 9.19 Tenglong Auto Parts
 - 9.19.1 Tenglong Auto Parts Details
 - 9.19.2 Tenglong Auto Parts Major Business
 - 9.19.3 Tenglong Auto Parts Automotive Thermal Management Product and Services
 - 9.19.4 Tenglong Auto Parts Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Tenglong Auto Parts Recent Developments/Updates
 - 9.19.6 Tenglong Auto Parts Competitive Strengths & Weaknesses

9.20 Tuopu Group

9.20.1 Tuopu Group Details

9.20.2 Tuopu Group Major Business

9.20.3 Tuopu Group Automotive Thermal Management Product and Services

9.20.4 Tuopu Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026)

9.20.5 Tuopu Group Recent Developments/Updates

9.20.6 Tuopu Group Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Automotive Thermal Management Industry Chain

10.2 Automotive Thermal Management Upstream Analysis

10.3 Automotive Thermal Management Midstream Analysis

10.4 Automotive Thermal Management Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Automotive Thermal Management Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Automotive Thermal Management Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Automotive Thermal Management Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Automotive Thermal Management Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Automotive Thermal Management Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Automotive Thermal Management Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Automotive Thermal Management Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Automotive Thermal Management Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Automotive Thermal Management Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Automotive Thermal Management Players in 2025

Table 12. World Automotive Thermal Management Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Automotive Thermal Management Company Evaluation Quadrant

Table 14. Head Office of Key Automotive Thermal Management Players

Table 15. Automotive Thermal Management Market: Company Product Type Footprint

Table 16. Automotive Thermal Management Market: Company Product Application Footprint

Table 17. Automotive Thermal Management Mergers & Acquisitions Activity

Table 18. United States VS China Automotive Thermal Management Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Automotive Thermal Management Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Automotive Thermal Management Companies, Headquarters (States, Country)

Table 21. United States Based Companies Automotive Thermal Management Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Automotive Thermal Management Revenue Market Share (2021-2026)

Table 23. China Based Automotive Thermal Management Companies, Headquarters (Province, Country)

Table 24. China Based Companies Automotive Thermal Management Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Automotive Thermal Management Revenue Market Share (2021-2026)

Table 26. Rest of World Based Automotive Thermal Management Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Automotive Thermal Management Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Automotive Thermal Management Revenue Market Share (2021-2026)

Table 29. World Automotive Thermal Management Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Automotive Thermal Management Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Automotive Thermal Management Market Size by Type (2027-2032) & (USD Million)

Table 32. World Automotive Thermal Management Market Size by Vehicle Power Source, (USD Million), 2021 & 2025 & 2032

Table 33. World Automotive Thermal Management Market Size Value by Vehicle Power Source (2021-2026) & (USD Million)

Table 34. World Automotive Thermal Management Market Size by Vehicle Power Source (2027-2032) & (USD Million)

Table 35. World Automotive Thermal Management Market Size by Sales Channel, (USD Million), 2021 & 2025 & 2032

Table 36. World Automotive Thermal Management Market Size Value by Sales Channel (2021-2026) & (USD Million)

Table 37. World Automotive Thermal Management Market Size by Sales Channel (2027-2032) & (USD Million)

Table 38. World Automotive Thermal Management Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Automotive Thermal Management Market Size by Application (2021-2026) & (USD Million)

Table 40. World Automotive Thermal Management Market Size by Application

(2027-2032) & (USD Million)

Table 41. DENSO Basic Information, Manufacturing Base and Competitors

Table 42. DENSO Major Business

Table 43. DENSO Automotive Thermal Management Product and Services

Table 44. DENSO Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 45. DENSO Recent Developments/Updates

Table 46. DENSO Competitive Strengths & Weaknesses

Table 47. Hanon Systems Basic Information, Manufacturing Base and Competitors

Table 48. Hanon Systems Major Business

Table 49. Hanon Systems Automotive Thermal Management Product and Services

Table 50. Hanon Systems Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 51. Hanon Systems Recent Developments/Updates

Table 52. Hanon Systems Competitive Strengths & Weaknesses

Table 53. Valeo Basic Information, Manufacturing Base and Competitors

Table 54. Valeo Major Business

Table 55. Valeo Automotive Thermal Management Product and Services

Table 56. Valeo Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 57. Valeo Recent Developments/Updates

Table 58. Valeo Competitive Strengths & Weaknesses

Table 59. MAHLE GmbH Basic Information, Manufacturing Base and Competitors

Table 60. MAHLE GmbH Major Business

Table 61. MAHLE GmbH Automotive Thermal Management Product and Services

Table 62. MAHLE GmbH Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 63. MAHLE GmbH Recent Developments/Updates

Table 64. MAHLE GmbH Competitive Strengths & Weaknesses

Table 65. Sanhua Intelligent Controls Basic Information, Manufacturing Base and Competitors

Table 66. Sanhua Intelligent Controls Major Business

Table 67. Sanhua Intelligent Controls Automotive Thermal Management Product and Services

Table 68. Sanhua Intelligent Controls Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 69. Sanhua Intelligent Controls Recent Developments/Updates

Table 70. Sanhua Intelligent Controls Competitive Strengths & Weaknesses

Table 71. Sanden Basic Information, Manufacturing Base and Competitors

- Table 72. Sanden Major Business
- Table 73. Sanden Automotive Thermal Management Product and Services
- Table 74. Sanden Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 75. Sanden Recent Developments/Updates
- Table 76. Sanden Competitive Strengths & Weaknesses
- Table 77. Aotecar Basic Information, Manufacturing Base and Competitors
- Table 78. Aotecar Major Business
- Table 79. Aotecar Automotive Thermal Management Product and Services
- Table 80. Aotecar Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 81. Aotecar Recent Developments/Updates
- Table 82. Aotecar Competitive Strengths & Weaknesses
- Table 83. Yinlun Machinery Basic Information, Manufacturing Base and Competitors
- Table 84. Yinlun Machinery Major Business
- Table 85. Yinlun Machinery Automotive Thermal Management Product and Services
- Table 86. Yinlun Machinery Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 87. Yinlun Machinery Recent Developments/Updates
- Table 88. Yinlun Machinery Competitive Strengths & Weaknesses
- Table 89. HASCO Basic Information, Manufacturing Base and Competitors
- Table 90. HASCO Major Business
- Table 91. HASCO Automotive Thermal Management Product and Services
- Table 92. HASCO Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 93. HASCO Recent Developments/Updates
- Table 94. HASCO Competitive Strengths & Weaknesses
- Table 95. Bosch Basic Information, Manufacturing Base and Competitors
- Table 96. Bosch Major Business
- Table 97. Bosch Automotive Thermal Management Product and Services
- Table 98. Bosch Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 99. Bosch Recent Developments/Updates
- Table 100. Bosch Competitive Strengths & Weaknesses
- Table 101. Johnson Electric Basic Information, Manufacturing Base and Competitors
- Table 102. Johnson Electric Major Business
- Table 103. Johnson Electric Automotive Thermal Management Product and Services
- Table 104. Johnson Electric Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

- Table 105. Johnson Electric Recent Developments/Updates
- Table 106. Johnson Electric Competitive Strengths & Weaknesses
- Table 107. Highly Group Basic Information, Manufacturing Base and Competitors
- Table 108. Highly Group Major Business
- Table 109. Highly Group Automotive Thermal Management Product and Services
- Table 110. Highly Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 111. Highly Group Recent Developments/Updates
- Table 112. Highly Group Competitive Strengths & Weaknesses
- Table 113. BorgWarner Basic Information, Manufacturing Base and Competitors
- Table 114. BorgWarner Major Business
- Table 115. BorgWarner Automotive Thermal Management Product and Services
- Table 116. BorgWarner Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 117. BorgWarner Recent Developments/Updates
- Table 118. BorgWarner Competitive Strengths & Weaknesses
- Table 119. Zhongding Group Basic Information, Manufacturing Base and Competitors
- Table 120. Zhongding Group Major Business
- Table 121. Zhongding Group Automotive Thermal Management Product and Services
- Table 122. Zhongding Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 123. Zhongding Group Recent Developments/Updates
- Table 124. Zhongding Group Competitive Strengths & Weaknesses
- Table 125. Dana Incorporated Basic Information, Manufacturing Base and Competitors
- Table 126. Dana Incorporated Major Business
- Table 127. Dana Incorporated Automotive Thermal Management Product and Services
- Table 128. Dana Incorporated Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 129. Dana Incorporated Recent Developments/Updates
- Table 130. Dana Incorporated Competitive Strengths & Weaknesses
- Table 131. Songz Automobile Air Conditioning Basic Information, Manufacturing Base and Competitors
- Table 132. Songz Automobile Air Conditioning Major Business
- Table 133. Songz Automobile Air Conditioning Automotive Thermal Management Product and Services
- Table 134. Songz Automobile Air Conditioning Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 135. Songz Automobile Air Conditioning Recent Developments/Updates
- Table 136. Songz Automobile Air Conditioning Competitive Strengths & Weaknesses

- Table 137. Modine Basic Information, Manufacturing Base and Competitors
- Table 138. Modine Major Business
- Table 139. Modine Automotive Thermal Management Product and Services
- Table 140. Modine Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 141. Modine Recent Developments/Updates
- Table 142. Modine Competitive Strengths & Weaknesses
- Table 143. Feilong Auto Components Basic Information, Manufacturing Base and Competitors
- Table 144. Feilong Auto Components Major Business
- Table 145. Feilong Auto Components Automotive Thermal Management Product and Services
- Table 146. Feilong Auto Components Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 147. Feilong Auto Components Recent Developments/Updates
- Table 148. Feilong Auto Components Competitive Strengths & Weaknesses
- Table 149. Tenglong Auto Parts Basic Information, Manufacturing Base and Competitors
- Table 150. Tenglong Auto Parts Major Business
- Table 151. Tenglong Auto Parts Automotive Thermal Management Product and Services
- Table 152. Tenglong Auto Parts Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 153. Tenglong Auto Parts Recent Developments/Updates
- Table 154. Tenglong Auto Parts Competitive Strengths & Weaknesses
- Table 155. Tuopu Group Basic Information, Manufacturing Base and Competitors
- Table 156. Tuopu Group Major Business
- Table 157. Tuopu Group Automotive Thermal Management Product and Services
- Table 158. Tuopu Group Automotive Thermal Management Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
- Table 159. Tuopu Group Recent Developments/Updates
- Table 160. Tuopu Group Competitive Strengths & Weaknesses
- Table 161. Global Key Players of Automotive Thermal Management Upstream (Raw Materials)
- Table 162. Global Automotive Thermal Management Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Automotive Thermal Management Picture

Figure 2. World Automotive Thermal Management Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Automotive Thermal Management Total Revenue (2021-2032) & (USD Million)

Figure 4. World Automotive Thermal Management Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Automotive Thermal Management Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Automotive Thermal Management Revenue (2021-2032) & (USD Million)

Figure 13. Automotive Thermal Management Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 16. World Automotive Thermal Management Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 18. China Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 23. India Automotive Thermal Management Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Automotive Thermal Management by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Automotive Thermal Management Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Automotive Thermal Management Markets in 2025

Figure 27. United States VS China: Automotive Thermal Management Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automotive Thermal Management Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Automotive Thermal Management Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Automotive Thermal Management Market Size Market Share by Type in 2025

Figure 31. Powertrain System

Figure 32. Passenger Cabin Thermal Management System

Figure 33. Motor Control Thermal Management System

Figure 34. Battery Thermal Management System

Figure 35. World Automotive Thermal Management Market Size Market Share by Type (2021-2032)

Figure 36. World Automotive Thermal Management Market Size by Vehicle Power Source, (USD Million), 2021 & 2025 & 2032

Figure 37. World Automotive Thermal Management Market Size Market Share by Vehicle Power Source in 2025

Figure 38. Internal Combustion Engines

Figure 39. New Energy Vehicles

Figure 40. World Automotive Thermal Management Market Size Market Share by Vehicle Power Source (2021-2032)

Figure 41. World Automotive Thermal Management Market Size by Sales Channel, (USD Million), 2021 & 2025 & 2032

Figure 42. World Automotive Thermal Management Market Size Market Share by Sales

Channel in 2025

Figure 43. OEM

Figure 44. Aftermarket

Figure 45. World Automotive Thermal Management Market Size Market Share by Sales Channel (2021-2032)

Figure 46. World Automotive Thermal Management Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 47. World Automotive Thermal Management Market Size Market Share by Application in 2025

Figure 48. Passenger Car

Figure 49. Commercial Vehicle

Figure 50. World Automotive Thermal Management Market Size Market Share by Application (2021-2032)

Figure 51. Automotive Thermal Management Industrial Chain

Figure 52. Methodology

Figure 53. Research Process and Data Source

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