

Global Heat Pump Integrated Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heat Pump Integrated Modules market size is expected to reach \$ 5642 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

In 2024, global production reached approximately 7026 K units , with an average global market price of around US\$ 274 per unit.

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 rising. 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 products are more compact, which can simplify the vehicle's space layout, reduce piping layout, reduce costs, and reduce volume and weight. Heat Pump Integrated Modules, also known as thermal management integrated modules, are core components for the thermal management of new energy vehicles. By integrating components such as the water-cooled condenser, chiller, electronic water pump, electronic water valve, refrigerant integrated channel, water kettle and water channel, and liquid separator (customized according to user needs) into a single module, more precise temperature control and better heat distribution are achieved, ultimately improving vehicle performance. The core upstream components of Heat Pump 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 Heat Pump Integrated Module 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.

Compared to traditional gasoline vehicles, the main difference in electric vehicles lies in the replacement of the gasoline engine system with three key components (battery, motor, and electronic control). Correspondingly, the engine cooling system becomes the power battery thermal management and motor/electronic control cooling system. While the original air conditioning system is retained, the loss of the original energy source—the engine—results in significant changes to its main components. The electric vehicle thermal management system comprises three parts: cabin thermal management (heating and cooling), battery system thermal management (heating and cooling), and motor/electronic control cooling. Early on, due to limitations in the electric vehicle architecture and insufficient integration capabilities of component suppliers, the various subsystems of electric vehicle thermal management generally adopted a decentralized architecture. Decentralized thermal management systems resulted in high costs due to redundant components and piping, and lacked unified coordination and management of the entire vehicle's thermal management, leading to low efficiency and ineffective utilization of battery and motor waste heat. From a system architecture perspective, electric vehicle thermal management is evolving from decentralized operation of individual subsystems to integration. Integrated thermal management systems can recover waste heat from the three key components to reduce energy consumption and improve heat pump performance. Since heat pump systems perform poorly in low-temperature scenarios, recovering and utilizing battery and motor waste heat can improve their performance without increasing energy consumption. Tesla pioneered highly integrated thermal management systems, and its product has now evolved to its fourth generation. Following Tesla's integration, companies including BYD, Huawei, and Li Auto have all launched their own Thermal Management Integrated Modules (TMIM) for EVs solutions.

With the rapid global penetration of new energy vehicles, market demand for Heat Pump Integrated Modules (HPIMs), 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, HPIMs have become an indispensable component of new energy vehicles. Currently, the global Heat Pump Integrated Modules 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 Heat Pump Integrated Modules 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.

This report studies the global Heat Pump Integrated Modules production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heat Pump Integrated Modules 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 Heat Pump Integrated Modules that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heat Pump Integrated Modules total production and demand, 2021-2032, (K Units)

Global Heat Pump Integrated Modules total production value, 2021-2032, (USD Million)

Global Heat Pump Integrated Modules production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Heat Pump Integrated Modules consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Heat Pump Integrated Modules domestic production, consumption, key domestic manufacturers and share

Global Heat Pump Integrated Modules production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Heat Pump Integrated Modules production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Heat Pump Integrated Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Heat Pump Integrated Modules market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study 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.

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 Heat Pump Integrated Modules market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, 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 Heat Pump Integrated Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Heat Pump Integrated Modules Market, Segmentation by Type:

Traditional Refrigerant Module

New Refrigerant Module

Global Heat Pump Integrated Modules Market, Segmentation by Chiller Heat Exchange:

5kw Below

5-10kw

10kw Above

Global Heat Pump Integrated Modules Market, Segmentation by LCC Heat Exchange:

10kw Below

10-15kw

15kw Above

Global Heat Pump Integrated Modules Market, Segmentation by Application:

BEV

PHEV

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Heat Pump Integrated Modules market?
2. What is the demand of the global Heat Pump Integrated Modules market?
3. What is the year over year growth of the global Heat Pump Integrated Modules market?
4. What is the production and production value of the global Heat Pump Integrated Modules market?
5. Who are the key producers in the global Heat Pump Integrated Modules market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Heat Pump Integrated Modules Introduction
- 1.2 World Heat Pump Integrated Modules Supply & Forecast
 - 1.2.1 World Heat Pump Integrated Modules Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Heat Pump Integrated Modules Production (2021-2032)
 - 1.2.3 World Heat Pump Integrated Modules Pricing Trends (2021-2032)
- 1.3 World Heat Pump Integrated Modules Production by Region (Based on Production Site)
 - 1.3.1 World Heat Pump Integrated Modules Production Value by Region (2021-2032)
 - 1.3.2 World Heat Pump Integrated Modules Production by Region (2021-2032)
 - 1.3.3 World Heat Pump Integrated Modules Average Price by Region (2021-2032)
 - 1.3.4 North America Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.5 Europe Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.6 China Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.7 Japan Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.8 South Korea Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.9 India Heat Pump Integrated Modules Production (2021-2032)
 - 1.3.10 Mexico Heat Pump Integrated Modules Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Heat Pump Integrated Modules Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Heat Pump Integrated Modules Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Heat Pump Integrated Modules Demand (2021-2032)
- 2.2 World Heat Pump Integrated Modules Consumption by Region
 - 2.2.1 World Heat Pump Integrated Modules Consumption by Region (2021-2026)
 - 2.2.2 World Heat Pump Integrated Modules Consumption Forecast by Region (2027-2032)
- 2.3 United States Heat Pump Integrated Modules Consumption (2021-2032)
- 2.4 China Heat Pump Integrated Modules Consumption (2021-2032)
- 2.5 Europe Heat Pump Integrated Modules Consumption (2021-2032)
- 2.6 Japan Heat Pump Integrated Modules Consumption (2021-2032)
- 2.7 South Korea Heat Pump Integrated Modules Consumption (2021-2032)
- 2.8 ASEAN Heat Pump Integrated Modules Consumption (2021-2032)

2.9 India Heat Pump Integrated Modules Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Heat Pump Integrated Modules Production Value by Manufacturer (2021-2026)

3.2 World Heat Pump Integrated Modules Production by Manufacturer (2021-2026)

3.3 World Heat Pump Integrated Modules Average Price by Manufacturer (2021-2026)

3.4 Heat Pump Integrated Modules Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Heat Pump Integrated Modules Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Heat Pump Integrated Modules in 2025

3.5.3 Global Concentration Ratios (CR8) for Heat Pump Integrated Modules in 2025

3.6 Heat Pump Integrated Modules Market: Overall Company Footprint Analysis

3.6.1 Heat Pump Integrated Modules Market: Region Footprint

3.6.2 Heat Pump Integrated Modules Market: Company Product Type Footprint

3.6.3 Heat Pump Integrated Modules Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Heat Pump Integrated Modules Production Value Comparison

4.1.1 United States VS China: Heat Pump Integrated Modules Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Heat Pump Integrated Modules Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Heat Pump Integrated Modules Production Comparison

4.2.1 United States VS China: Heat Pump Integrated Modules Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Heat Pump Integrated Modules Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Heat Pump Integrated Modules Consumption Comparison

4.3.1 United States VS China: Heat Pump Integrated Modules Consumption

Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Heat Pump Integrated Modules Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Heat Pump Integrated Modules Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Heat Pump Integrated Modules Production Value (2021-2026)

4.4.3 United States Based Manufacturers Heat Pump Integrated Modules Production (2021-2026)

4.5 China Based Heat Pump Integrated Modules Manufacturers and Market Share

4.5.1 China Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Heat Pump Integrated Modules Production Value (2021-2026)

4.5.3 China Based Manufacturers Heat Pump Integrated Modules Production (2021-2026)

4.6 Rest of World Based Heat Pump Integrated Modules Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Heat Pump Integrated Modules Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Heat Pump Integrated Modules Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Heat Pump Integrated Modules Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Traditional Refrigerant Module

5.2.2 New Refrigerant Module

5.3 Market Segment by Type

5.3.1 World Heat Pump Integrated Modules Production by Type (2021-2032)

5.3.2 World Heat Pump Integrated Modules Production Value by Type (2021-2032)

5.3.3 World Heat Pump Integrated Modules Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CHILLER HEAT EXCHANGE

6.1 World Heat Pump Integrated Modules Market Size Overview by Chiller Heat Exchange: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Chiller Heat Exchange

6.2.1 5kw Below

6.2.2 5-10kw

6.2.3 10kw Above

6.3 Market Segment by Chiller Heat Exchange

6.3.1 World Heat Pump Integrated Modules Production by Chiller Heat Exchange (2021-2032)

6.3.2 World Heat Pump Integrated Modules Production Value by Chiller Heat Exchange (2021-2032)

6.3.3 World Heat Pump Integrated Modules Average Price by Chiller Heat Exchange (2021-2032)

7 MARKET ANALYSIS BY LCC HEAT EXCHANGE

7.1 World Heat Pump Integrated Modules Market Size Overview by LCC Heat Exchange: 2021 VS 2025 VS 2032

7.2 Segment Introduction by LCC Heat Exchange

7.2.1 10kw Below

7.2.2 10-15kw

7.2.3 15kw Above

7.3 Market Segment by LCC Heat Exchange

7.3.1 World Heat Pump Integrated Modules Production by LCC Heat Exchange (2021-2032)

7.3.2 World Heat Pump Integrated Modules Production Value by LCC Heat Exchange (2021-2032)

7.3.3 World Heat Pump Integrated Modules Average Price by LCC Heat Exchange (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Heat Pump Integrated Modules Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 BEV

8.2.2 PHEV

8.3 Market Segment by Application

8.3.1 World Heat Pump Integrated Modules Production by Application (2021-2032)

8.3.2 World Heat Pump Integrated Modules Production Value by Application (2021-2032)

8.3.3 World Heat Pump Integrated Modules Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Sanhua

9.1.1 Sanhua Details

9.1.2 Sanhua Major Business

9.1.3 Sanhua Heat Pump Integrated Modules Product and Services

9.1.4 Sanhua Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Sanhua Recent Developments/Updates

9.1.6 Sanhua Competitive Strengths & Weaknesses

9.2 Ningbo Tuopu Group

9.2.1 Ningbo Tuopu Group Details

9.2.2 Ningbo Tuopu Group Major Business

9.2.3 Ningbo Tuopu Group Heat Pump Integrated Modules Product and Services

9.2.4 Ningbo Tuopu Group Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Ningbo Tuopu Group Recent Developments/Updates

9.2.6 Ningbo Tuopu Group Competitive Strengths & Weaknesses

9.3 Yinlun

9.3.1 Yinlun Details

9.3.2 Yinlun Major Business

9.3.3 Yinlun Heat Pump Integrated Modules Product and Services

9.3.4 Yinlun Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Yinlun Recent Developments/Updates

9.3.6 Yinlun Competitive Strengths & Weaknesses

9.4 Valeo

9.4.1 Valeo Details

9.4.2 Valeo Major Business

9.4.3 Valeo Heat Pump Integrated Modules Product and Services

9.4.4 Valeo Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Valeo Recent Developments/Updates

9.4.6 Valeo Competitive Strengths & Weaknesses

9.5 Mahle GmbH

9.5.1 Mahle GmbH Details

9.5.2 Mahle GmbH Major Business

9.5.3 Mahle GmbH Heat Pump Integrated Modules Product and Services

9.5.4 Mahle GmbH Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Mahle GmbH Recent Developments/Updates

9.5.6 Mahle GmbH Competitive Strengths & Weaknesses

9.6 Hanon Systems

9.6.1 Hanon Systems Details

9.6.2 Hanon Systems Major Business

9.6.3 Hanon Systems Heat Pump Integrated Modules Product and Services

9.6.4 Hanon Systems Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Hanon Systems Recent Developments/Updates

9.6.6 Hanon Systems Competitive Strengths & Weaknesses

9.7 HYUNDAI WIA

9.7.1 HYUNDAI WIA Details

9.7.2 HYUNDAI WIA Major Business

9.7.3 HYUNDAI WIA Heat Pump Integrated Modules Product and Services

9.7.4 HYUNDAI WIA Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 HYUNDAI WIA Recent Developments/Updates

9.7.6 HYUNDAI WIA Competitive Strengths & Weaknesses

9.8 Songz Automobile Air Conditioning

9.8.1 Songz Automobile Air Conditioning Details

9.8.2 Songz Automobile Air Conditioning Major Business

9.8.3 Songz Automobile Air Conditioning Heat Pump Integrated Modules Product and Services

9.8.4 Songz Automobile Air Conditioning Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Songz Automobile Air Conditioning Recent Developments/Updates

9.8.6 Songz Automobile Air Conditioning Competitive Strengths & Weaknesses

9.9 Changzhou Tenglong Auto Parts

9.9.1 Changzhou Tenglong Auto Parts Details

9.9.2 Changzhou Tenglong Auto Parts Major Business

9.9.3 Changzhou Tenglong Auto Parts Heat Pump Integrated Modules Product and Services

- 9.9.4 Changzhou Tenglong Auto Parts Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.9.5 Changzhou Tenglong Auto Parts Recent Developments/Updates
- 9.9.6 Changzhou Tenglong Auto Parts Competitive Strengths & Weaknesses
- 9.10 Jiangsu Chaoli Electric Manufacture
 - 9.10.1 Jiangsu Chaoli Electric Manufacture Details
 - 9.10.2 Jiangsu Chaoli Electric Manufacture Major Business
 - 9.10.3 Jiangsu Chaoli Electric Manufacture Heat Pump Integrated Modules Product and Services
 - 9.10.4 Jiangsu Chaoli Electric Manufacture Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Jiangsu Chaoli Electric Manufacture Recent Developments/Updates
 - 9.10.6 Jiangsu Chaoli Electric Manufacture Competitive Strengths & Weaknesses
- 9.11 Denso Corporation
 - 9.11.1 Denso Corporation Details
 - 9.11.2 Denso Corporation Major Business
 - 9.11.3 Denso Corporation Heat Pump Integrated Modules Product and Services
 - 9.11.4 Denso Corporation Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Denso Corporation Recent Developments/Updates
 - 9.11.6 Denso Corporation Competitive Strengths & Weaknesses
- 9.12 Aisin
 - 9.12.1 Aisin Details
 - 9.12.2 Aisin Major Business
 - 9.12.3 Aisin Heat Pump Integrated Modules Product and Services
 - 9.12.4 Aisin Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Aisin Recent Developments/Updates
 - 9.12.6 Aisin Competitive Strengths & Weaknesses
- 9.13 Xiezhong International Thermal Management System
 - 9.13.1 Xiezhong International Thermal Management System Details
 - 9.13.2 Xiezhong International Thermal Management System Major Business
 - 9.13.3 Xiezhong International Thermal Management System Heat Pump Integrated Modules Product and Services
 - 9.13.4 Xiezhong International Thermal Management System Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Xiezhong International Thermal Management System Recent Developments/Updates
 - 9.13.6 Xiezhong International Thermal Management System Competitive Strengths &

Weaknesses

9.14 Mande Electronics

9.14.1 Mande Electronics Details

9.14.2 Mande Electronics Major Business

9.14.3 Mande Electronics Heat Pump Integrated Modules Product and Services

9.14.4 Mande Electronics Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Mande Electronics Recent Developments/Updates

9.14.6 Mande Electronics Competitive Strengths & Weaknesses

9.15 Feilong Automotive Parts

9.15.1 Feilong Automotive Parts Details

9.15.2 Feilong Automotive Parts Major Business

9.15.3 Feilong Automotive Parts Heat Pump Integrated Modules Product and Services

9.15.4 Feilong Automotive Parts Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Feilong Automotive Parts Recent Developments/Updates

9.15.6 Feilong Automotive Parts Competitive Strengths & Weaknesses

9.16 United Automotive Electronic System

9.16.1 United Automotive Electronic System Details

9.16.2 United Automotive Electronic System Major Business

9.16.3 United Automotive Electronic System Heat Pump Integrated Modules Product and Services

9.16.4 United Automotive Electronic System Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 United Automotive Electronic System Recent Developments/Updates

9.16.6 United Automotive Electronic System Competitive Strengths & Weaknesses

9.17 Shanghai Highly

9.17.1 Shanghai Highly Details

9.17.2 Shanghai Highly Major Business

9.17.3 Shanghai Highly Heat Pump Integrated Modules Product and Services

9.17.4 Shanghai Highly Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Shanghai Highly Recent Developments/Updates

9.17.6 Shanghai Highly Competitive Strengths & Weaknesses

9.18 Yuxin Automotive Thermal Management Technologies

9.18.1 Yuxin Automotive Thermal Management Technologies Details

9.18.2 Yuxin Automotive Thermal Management Technologies Major Business

9.18.3 Yuxin Automotive Thermal Management Technologies Heat Pump Integrated Modules Product and Services

9.18.4 Yuxin Automotive Thermal Management Technologies Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Yuxin Automotive Thermal Management Technologies Recent Developments/Updates

9.18.6 Yuxin Automotive Thermal Management Technologies Competitive Strengths & Weaknesses

9.19 Tianjin Pengling Group

9.19.1 Tianjin Pengling Group Details

9.19.2 Tianjin Pengling Group Major Business

9.19.3 Tianjin Pengling Group Heat Pump Integrated Modules Product and Services

9.19.4 Tianjin Pengling Group Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 Tianjin Pengling Group Recent Developments/Updates

9.19.6 Tianjin Pengling Group Competitive Strengths & Weaknesses

9.20 Hangzhou Lingdong Automotive Thermal Management Technology

9.20.1 Hangzhou Lingdong Automotive Thermal Management Technology Details

9.20.2 Hangzhou Lingdong Automotive Thermal Management Technology Major Business

9.20.3 Hangzhou Lingdong Automotive Thermal Management Technology Heat Pump Integrated Modules Product and Services

9.20.4 Hangzhou Lingdong Automotive Thermal Management Technology Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Hangzhou Lingdong Automotive Thermal Management Technology Recent Developments/Updates

9.20.6 Hangzhou Lingdong Automotive Thermal Management Technology Competitive Strengths & Weaknesses

9.21 Longquan Xiazhi Thermal Management System

9.21.1 Longquan Xiazhi Thermal Management System Details

9.21.2 Longquan Xiazhi Thermal Management System Major Business

9.21.3 Longquan Xiazhi Thermal Management System Heat Pump Integrated Modules Product and Services

9.21.4 Longquan Xiazhi Thermal Management System Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 Longquan Xiazhi Thermal Management System Recent Developments/Updates

9.21.6 Longquan Xiazhi Thermal Management System Competitive Strengths & Weaknesses

9.22 Yapp Automotive Systems

9.22.1 Yapp Automotive Systems Details

- 9.22.2 Yapp Automotive Systems Major Business
- 9.22.3 Yapp Automotive Systems Heat Pump Integrated Modules Product and Services
- 9.22.4 Yapp Automotive Systems Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.22.5 Yapp Automotive Systems Recent Developments/Updates
- 9.22.6 Yapp Automotive Systems Competitive Strengths & Weaknesses
- 9.23 PXI AUTO COMPONENTS
 - 9.23.1 PXI AUTO COMPONENTS Details
 - 9.23.2 PXI AUTO COMPONENTS Major Business
 - 9.23.3 PXI AUTO COMPONENTS Heat Pump Integrated Modules Product and Services
 - 9.23.4 PXI AUTO COMPONENTS Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 PXI AUTO COMPONENTS Recent Developments/Updates
 - 9.23.6 PXI AUTO COMPONENTS Competitive Strengths & Weaknesses
- 9.24 Shanghai Dachuang Automotive Technology
 - 9.24.1 Shanghai Dachuang Automotive Technology Details
 - 9.24.2 Shanghai Dachuang Automotive Technology Major Business
 - 9.24.3 Shanghai Dachuang Automotive Technology Heat Pump Integrated Modules Product and Services
 - 9.24.4 Shanghai Dachuang Automotive Technology Heat Pump Integrated Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.24.5 Shanghai Dachuang Automotive Technology Recent Developments/Updates
 - 9.24.6 Shanghai Dachuang Automotive Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Heat Pump Integrated Modules Industry Chain
- 10.2 Heat Pump Integrated Modules Upstream Analysis
 - 10.2.1 Heat Pump Integrated Modules Core Raw Materials
 - 10.2.2 Main Manufacturers of Heat Pump Integrated Modules Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Heat Pump Integrated Modules Production Mode
- 10.6 Heat Pump Integrated Modules Procurement Model
- 10.7 Heat Pump Integrated Modules Industry Sales Model and Sales Channels
 - 10.7.1 Heat Pump Integrated Modules Sales Model

10.7.2 Heat Pump Integrated Modules Typical Distributors

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 Heat Pump Integrated Modules Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Heat Pump Integrated Modules Production Value by Region (2021-2026) & (USD Million)

Table 3. World Heat Pump Integrated Modules Production Value by Region (2027-2032) & (USD Million)

Table 4. World Heat Pump Integrated Modules Production Value Market Share by Region (2021-2026)

Table 5. World Heat Pump Integrated Modules Production Value Market Share by Region (2027-2032)

Table 6. World Heat Pump Integrated Modules Production by Region (2021-2026) & (K Units)

Table 7. World Heat Pump Integrated Modules Production by Region (2027-2032) & (K Units)

Table 8. World Heat Pump Integrated Modules Production Market Share by Region (2021-2026)

Table 9. World Heat Pump Integrated Modules Production Market Share by Region (2027-2032)

Table 10. World Heat Pump Integrated Modules Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Heat Pump Integrated Modules Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Heat Pump Integrated Modules Major Market Trends

Table 13. World Heat Pump Integrated Modules Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Heat Pump Integrated Modules Consumption by Region (2021-2026) & (K Units)

Table 15. World Heat Pump Integrated Modules Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Heat Pump Integrated Modules Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Heat Pump Integrated Modules Producers in 2025

Table 18. World Heat Pump Integrated Modules Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Heat Pump Integrated Modules Producers in 2025

Table 20. World Heat Pump Integrated Modules Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Heat Pump Integrated Modules Company Evaluation Quadrant

Table 22. World Heat Pump Integrated Modules Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Heat Pump Integrated Modules Production Site of Key Manufacturer

Table 24. Heat Pump Integrated Modules Market: Company Product Type Footprint

Table 25. Heat Pump Integrated Modules Market: Company Product Application Footprint

Table 26. Heat Pump Integrated Modules Competitive Factors

Table 27. Heat Pump Integrated Modules New Entrant and Capacity Expansion Plans

Table 28. Heat Pump Integrated Modules Mergers & Acquisitions Activity

Table 29. United States VS China Heat Pump Integrated Modules Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Heat Pump Integrated Modules Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Heat Pump Integrated Modules Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Heat Pump Integrated Modules Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Heat Pump Integrated Modules Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Heat Pump Integrated Modules Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Heat Pump Integrated Modules Production Market Share (2021-2026)

Table 37. China Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Heat Pump Integrated Modules Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Heat Pump Integrated Modules Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Heat Pump Integrated Modules Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Heat Pump Integrated Modules Production Market Share (2021-2026)

Table 42. Rest of World Based Heat Pump Integrated Modules Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Heat Pump Integrated Modules Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Heat Pump Integrated Modules Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Heat Pump Integrated Modules Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Heat Pump Integrated Modules Production Market Share (2021-2026)

Table 47. World Heat Pump Integrated Modules Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Heat Pump Integrated Modules Production by Type (2021-2026) & (K Units)

Table 49. World Heat Pump Integrated Modules Production by Type (2027-2032) & (K Units)

Table 50. World Heat Pump Integrated Modules Production Value by Type (2021-2026) & (USD Million)

Table 51. World Heat Pump Integrated Modules Production Value by Type (2027-2032) & (USD Million)

Table 52. World Heat Pump Integrated Modules Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Heat Pump Integrated Modules Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Heat Pump Integrated Modules Production Value by Chiller Heat Exchange, (USD Million), 2021 & 2025 & 2032

Table 55. World Heat Pump Integrated Modules Production by Chiller Heat Exchange (2021-2026) & (K Units)

Table 56. World Heat Pump Integrated Modules Production by Chiller Heat Exchange (2027-2032) & (K Units)

Table 57. World Heat Pump Integrated Modules Production Value by Chiller Heat Exchange (2021-2026) & (USD Million)

Table 58. World Heat Pump Integrated Modules Production Value by Chiller Heat Exchange (2027-2032) & (USD Million)

Table 59. World Heat Pump Integrated Modules Average Price by Chiller Heat Exchange (2021-2026) & (US\$/Unit)

Table 60. World Heat Pump Integrated Modules Average Price by Chiller Heat

Exchange (2027-2032) & (US\$/Unit)

Table 61. World Heat Pump Integrated Modules Production Value by LCC Heat Exchange, (USD Million), 2021 & 2025 & 2032

Table 62. World Heat Pump Integrated Modules Production by LCC Heat Exchange (2021-2026) & (K Units)

Table 63. World Heat Pump Integrated Modules Production by LCC Heat Exchange (2027-2032) & (K Units)

Table 64. World Heat Pump Integrated Modules Production Value by LCC Heat Exchange (2021-2026) & (USD Million)

Table 65. World Heat Pump Integrated Modules Production Value by LCC Heat Exchange (2027-2032) & (USD Million)

Table 66. World Heat Pump Integrated Modules Average Price by LCC Heat Exchange (2021-2026) & (US\$/Unit)

Table 67. World Heat Pump Integrated Modules Average Price by LCC Heat Exchange (2027-2032) & (US\$/Unit)

Table 68. World Heat Pump Integrated Modules Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Heat Pump Integrated Modules Production by Application (2021-2026) & (K Units)

Table 70. World Heat Pump Integrated Modules Production by Application (2027-2032) & (K Units)

Table 71. World Heat Pump Integrated Modules Production Value by Application (2021-2026) & (USD Million)

Table 72. World Heat Pump Integrated Modules Production Value by Application (2027-2032) & (USD Million)

Table 73. World Heat Pump Integrated Modules Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Heat Pump Integrated Modules Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Sanhua Basic Information, Manufacturing Base and Competitors

Table 76. Sanhua Major Business

Table 77. Sanhua Heat Pump Integrated Modules Product and Services

Table 78. Sanhua Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Sanhua Recent Developments/Updates

Table 80. Sanhua Competitive Strengths & Weaknesses

Table 81. Ningbo Tuopu Group Basic Information, Manufacturing Base and Competitors

Table 82. Ningbo Tuopu Group Major Business

Table 83. Ningbo Tuopu Group Heat Pump Integrated Modules Product and Services

Table 84. Ningbo Tuopu Group Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Ningbo Tuopu Group Recent Developments/Updates

Table 86. Ningbo Tuopu Group Competitive Strengths & Weaknesses

Table 87. Yinlun Basic Information, Manufacturing Base and Competitors

Table 88. Yinlun Major Business

Table 89. Yinlun Heat Pump Integrated Modules Product and Services

Table 90. Yinlun Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Yinlun Recent Developments/Updates

Table 92. Yinlun Competitive Strengths & Weaknesses

Table 93. Valeo Basic Information, Manufacturing Base and Competitors

Table 94. Valeo Major Business

Table 95. Valeo Heat Pump Integrated Modules Product and Services

Table 96. Valeo Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Valeo Recent Developments/Updates

Table 98. Valeo Competitive Strengths & Weaknesses

Table 99. Mahle GmbH Basic Information, Manufacturing Base and Competitors

Table 100. Mahle GmbH Major Business

Table 101. Mahle GmbH Heat Pump Integrated Modules Product and Services

Table 102. Mahle GmbH Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Mahle GmbH Recent Developments/Updates

Table 104. Mahle GmbH Competitive Strengths & Weaknesses

Table 105. Hanon Systems Basic Information, Manufacturing Base and Competitors

Table 106. Hanon Systems Major Business

Table 107. Hanon Systems Heat Pump Integrated Modules Product and Services

Table 108. Hanon Systems Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Hanon Systems Recent Developments/Updates

Table 110. Hanon Systems Competitive Strengths & Weaknesses

Table 111. HYUNDAI WIA Basic Information, Manufacturing Base and Competitors

Table 112. HYUNDAI WIA Major Business

Table 113. HYUNDAI WIA Heat Pump Integrated Modules Product and Services

Table 114. HYUNDAI WIA Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. HYUNDAI WIA Recent Developments/Updates

Table 116. HYUNDAI WIA Competitive Strengths & Weaknesses

Table 117. Songz Automobile Air Conditioning Basic Information, Manufacturing Base and Competitors

Table 118. Songz Automobile Air Conditioning Major Business

Table 119. Songz Automobile Air Conditioning Heat Pump Integrated Modules Product and Services

Table 120. Songz Automobile Air Conditioning Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Songz Automobile Air Conditioning Recent Developments/Updates

Table 122. Songz Automobile Air Conditioning Competitive Strengths & Weaknesses

Table 123. Changzhou Tenglong Auto Parts Basic Information, Manufacturing Base and Competitors

Table 124. Changzhou Tenglong Auto Parts Major Business

Table 125. Changzhou Tenglong Auto Parts Heat Pump Integrated Modules Product and Services

Table 126. Changzhou Tenglong Auto Parts Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Changzhou Tenglong Auto Parts Recent Developments/Updates

Table 128. Changzhou Tenglong Auto Parts Competitive Strengths & Weaknesses

Table 129. Jiangsu Chaoli Electric Manufacture Basic Information, Manufacturing Base and Competitors

Table 130. Jiangsu Chaoli Electric Manufacture Major Business

Table 131. Jiangsu Chaoli Electric Manufacture Heat Pump Integrated Modules Product and Services

Table 132. Jiangsu Chaoli Electric Manufacture Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Jiangsu Chaoli Electric Manufacture Recent Developments/Updates

Table 134. Jiangsu Chaoli Electric Manufacture Competitive Strengths & Weaknesses

Table 135. Denso Corporation Basic Information, Manufacturing Base and Competitors

Table 136. Denso Corporation Major Business

Table 137. Denso Corporation Heat Pump Integrated Modules Product and Services

Table 138. Denso Corporation Heat Pump Integrated Modules Production (K Units),

Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Denso Corporation Recent Developments/Updates

Table 140. Denso Corporation Competitive Strengths & Weaknesses

Table 141. Aisin Basic Information, Manufacturing Base and Competitors

Table 142. Aisin Major Business

Table 143. Aisin Heat Pump Integrated Modules Product and Services

Table 144. Aisin Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Aisin Recent Developments/Updates

Table 146. Aisin Competitive Strengths & Weaknesses

Table 147. Xiezhong International Thermal Management System Basic Information, Manufacturing Base and Competitors

Table 148. Xiezhong International Thermal Management System Major Business

Table 149. Xiezhong International Thermal Management System Heat Pump Integrated Modules Product and Services

Table 150. Xiezhong International Thermal Management System Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Xiezhong International Thermal Management System Recent Developments/Updates

Table 152. Xiezhong International Thermal Management System Competitive Strengths & Weaknesses

Table 153. Mande Electronics Basic Information, Manufacturing Base and Competitors

Table 154. Mande Electronics Major Business

Table 155. Mande Electronics Heat Pump Integrated Modules Product and Services

Table 156. Mande Electronics Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Mande Electronics Recent Developments/Updates

Table 158. Mande Electronics Competitive Strengths & Weaknesses

Table 159. Feilong Automotive Parts Basic Information, Manufacturing Base and Competitors

Table 160. Feilong Automotive Parts Major Business

Table 161. Feilong Automotive Parts Heat Pump Integrated Modules Product and Services

Table 162. Feilong Automotive Parts Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Feilong Automotive Parts Recent Developments/Updates
Table 164. Feilong Automotive Parts Competitive Strengths & Weaknesses
Table 165. United Automotive Electronic System Basic Information, Manufacturing Base and Competitors
Table 166. United Automotive Electronic System Major Business
Table 167. United Automotive Electronic System Heat Pump Integrated Modules Product and Services
Table 168. United Automotive Electronic System Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. United Automotive Electronic System Recent Developments/Updates
Table 170. United Automotive Electronic System Competitive Strengths & Weaknesses
Table 171. Shanghai Highly Basic Information, Manufacturing Base and Competitors
Table 172. Shanghai Highly Major Business
Table 173. Shanghai Highly Heat Pump Integrated Modules Product and Services
Table 174. Shanghai Highly Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Shanghai Highly Recent Developments/Updates
Table 176. Shanghai Highly Competitive Strengths & Weaknesses
Table 177. Yuxin Automotive Thermal Management Technologies Basic Information, Manufacturing Base and Competitors
Table 178. Yuxin Automotive Thermal Management Technologies Major Business
Table 179. Yuxin Automotive Thermal Management Technologies Heat Pump Integrated Modules Product and Services
Table 180. Yuxin Automotive Thermal Management Technologies Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Yuxin Automotive Thermal Management Technologies Recent Developments/Updates
Table 182. Yuxin Automotive Thermal Management Technologies Competitive Strengths & Weaknesses
Table 183. Tianjin Pengling Group Basic Information, Manufacturing Base and Competitors
Table 184. Tianjin Pengling Group Major Business
Table 185. Tianjin Pengling Group Heat Pump Integrated Modules Product and Services
Table 186. Tianjin Pengling Group Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 187. Tianjin Pengling Group Recent Developments/Updates

Table 188. Tianjin Pengling Group Competitive Strengths & Weaknesses

Table 189. Hangzhou Lingdong Automotive Thermal Management Technology Basic Information, Manufacturing Base and Competitors

Table 190. Hangzhou Lingdong Automotive Thermal Management Technology Major Business

Table 191. Hangzhou Lingdong Automotive Thermal Management Technology Heat Pump Integrated Modules Product and Services

Table 192. Hangzhou Lingdong Automotive Thermal Management Technology Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Hangzhou Lingdong Automotive Thermal Management Technology Recent Developments/Updates

Table 194. Hangzhou Lingdong Automotive Thermal Management Technology Competitive Strengths & Weaknesses

Table 195. Longquan Xiazhi Thermal Management System Basic Information, Manufacturing Base and Competitors

Table 196. Longquan Xiazhi Thermal Management System Major Business

Table 197. Longquan Xiazhi Thermal Management System Heat Pump Integrated Modules Product and Services

Table 198. Longquan Xiazhi Thermal Management System Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. Longquan Xiazhi Thermal Management System Recent Developments/Updates

Table 200. Longquan Xiazhi Thermal Management System Competitive Strengths & Weaknesses

Table 201. Yapp Automotive Systems Basic Information, Manufacturing Base and Competitors

Table 202. Yapp Automotive Systems Major Business

Table 203. Yapp Automotive Systems Heat Pump Integrated Modules Product and Services

Table 204. Yapp Automotive Systems Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Yapp Automotive Systems Recent Developments/Updates

Table 206. Yapp Automotive Systems Competitive Strengths & Weaknesses

Table 207. PXI AUTO COMPONENTS Basic Information, Manufacturing Base and

Competitors

Table 208. PXI AUTO COMPONENTS Major Business

Table 209. PXI AUTO COMPONENTS Heat Pump Integrated Modules Product and Services

Table 210. PXI AUTO COMPONENTS Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. PXI AUTO COMPONENTS Recent Developments/Updates

Table 212. PXI AUTO COMPONENTS Competitive Strengths & Weaknesses

Table 213. Shanghai Dachuang Automotive Technology Basic Information, Manufacturing Base and Competitors

Table 214. Shanghai Dachuang Automotive Technology Major Business

Table 215. Shanghai Dachuang Automotive Technology Heat Pump Integrated Modules Product and Services

Table 216. Shanghai Dachuang Automotive Technology Heat Pump Integrated Modules Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Shanghai Dachuang Automotive Technology Recent Developments/Updates

Table 218. Shanghai Dachuang Automotive Technology Competitive Strengths & Weaknesses

Table 219. Global Key Players of Heat Pump Integrated Modules Upstream (Raw Materials)

Table 220. Global Heat Pump Integrated Modules Typical Customers

Table 221. Heat Pump Integrated Modules Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Heat Pump Integrated Modules Picture

Figure 2. World Heat Pump Integrated Modules Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Heat Pump Integrated Modules Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 5. World Heat Pump Integrated Modules Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Heat Pump Integrated Modules Production Value Market Share by Region (2021-2032)

Figure 7. World Heat Pump Integrated Modules Production Market Share by Region (2021-2032)

Figure 8. North America Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 9. Europe Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 10. China Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 11. Japan Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 12. South Korea Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 13. India Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 14. Mexico Heat Pump Integrated Modules Production (2021-2032) & (K Units)

Figure 15. Heat Pump Integrated Modules Market Drivers

Figure 16. Factors Affecting Demand

Figure 17. World Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 18. World Heat Pump Integrated Modules Consumption Market Share by Region (2021-2032)

Figure 19. United States Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 20. China Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 21. Europe Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 22. Japan Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 23. South Korea Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 24. ASEAN Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Units)

Figure 25. India Heat Pump Integrated Modules Consumption (2021-2032) & (K Units)

Figure 26. Producer Shipments of Heat Pump Integrated Modules by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 27. Global Four-firm Concentration Ratios (CR4) for Heat Pump Integrated Modules Markets in 2025

Figure 28. Global Four-firm Concentration Ratios (CR8) for Heat Pump Integrated Modules Markets in 2025

Figure 29. United States VS China: Heat Pump Integrated Modules Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Heat Pump Integrated Modules Production Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States VS China: Heat Pump Integrated Modules Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 32. United States Based Manufacturers Heat Pump Integrated Modules Production Market Share 2025

Figure 33. China Based Manufacturers Heat Pump Integrated Modules Production Market Share 2025

Figure 34. Rest of World Based Manufacturers Heat Pump Integrated Modules Production Market Share 2025

Figure 35. World Heat Pump Integrated Modules Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 36. World Heat Pump Integrated Modules Production Value Market Share by Type in 2025

Figure 37. Traditional Refrigerant Module

Figure 38. New Refrigerant Module

Figure 39. World Heat Pump Integrated Modules Production Market Share by Type (2021-2032)

Figure 40. World Heat Pump Integrated Modules Production Value Market Share by Type (2021-2032)

Figure 41. World Heat Pump Integrated Modules Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. World Heat Pump Integrated Modules Production Value by Chiller Heat Exchange, (USD Million), 2021 & 2025 & 2032

Figure 43. World Heat Pump Integrated Modules Production Value Market Share by Chiller Heat Exchange in 2025

Figure 44. 5kw Below

Figure 45. 5-10kw

Figure 46. 10kw Above

Figure 47. World Heat Pump Integrated Modules Production Market Share by Chiller Heat Exchange (2021-2032)

Figure 48. World Heat Pump Integrated Modules Production Value Market Share by Chiller Heat Exchange (2021-2032)

Figure 49. World Heat Pump Integrated Modules Average Price by Chiller Heat Exchange (2021-2032) & (US\$/Unit)

Figure 50. World Heat Pump Integrated Modules Production Value by LCC Heat Exchange, (USD Million), 2021 & 2025 & 2032

Figure 51. World Heat Pump Integrated Modules Production Value Market Share by LCC Heat Exchange in 2025

Figure 52. 10kw Below

Figure 53. 10-15kw

Figure 54. 15kw Above

Figure 55. World Heat Pump Integrated Modules Production Market Share by LCC Heat Exchange (2021-2032)

Figure 56. World Heat Pump Integrated Modules Production Value Market Share by LCC Heat Exchange (2021-2032)

Figure 57. World Heat Pump Integrated Modules Average Price by LCC Heat Exchange (2021-2032) & (US\$/Unit)

Figure 58. World Heat Pump Integrated Modules Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 59. World Heat Pump Integrated Modules Production Value Market Share by Application in 2025

Figure 60. BEV

Figure 61. PHEV

Figure 62. World Heat Pump Integrated Modules Production Market Share by Application (2021-2032)

Figure 63. World Heat Pump Integrated Modules Production Value Market Share by Application (2021-2032)

Figure 64. World Heat Pump Integrated Modules Average Price by Application (2021-2032) & (US\$/Unit)

Figure 65. Heat Pump Integrated Modules Industry Chain

Figure 66. Heat Pump Integrated Modules Procurement Model

Figure 67. Heat Pump Integrated Modules Sales Model

Figure 68. Heat Pump Integrated Modules Sales Channels, Direct Sales, and Distribution

Figure 69. Methodology

Figure 70. Research Process and Data Source

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