

Global New Energy Vehicle Heater Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global New Energy Vehicle Heater market size is expected to reach \$ 3672 million by 2032, rising at a market growth of 9.5% CAGR during the forecast period (2026-2032).

In 2025, global new energy vehicle (NEV) heater production capacity is approximately 28 million units, with actual output around 23.5 million units. The average selling price is about US\$320 per unit, depending on power rating, heating technology (PTC air heater or water heater), voltage platform (400V/800V), and system integration level. Gross margins generally range from 22% to 36%, supported by rapid EV penetration and increasing demand for integrated thermal management systems. A new energy vehicle heater is an electric heating device used in battery electric vehicles (BEV) and plug-in hybrid vehicles (PHEV) to provide cabin heating and/or battery thermal management. The most common technology is the PTC (Positive Temperature Coefficient) heater, which uses ceramic heating elements with self-regulating resistance characteristics. Typical PTC heater power ranges from 2 kW to 8 kW for cabin air heating, while high-voltage coolant heaters for battery systems can reach 10 kW or higher. Conversion efficiency of electric heating is generally above 95%, but it directly impacts driving range due to battery energy consumption.

Upstream includes PTC ceramic elements, aluminum heat exchangers, high-voltage relays, IGBT/MOSFET power modules, temperature sensors, and insulation materials. Midstream involves heater module design, thermal simulation, high-voltage safety design, waterproof and vibration validation, and integration with vehicle thermal management systems. Downstream customers are OEM automakers and Tier-1 thermal system suppliers. Key barriers include high-voltage safety compliance (ISO 26262), thermal efficiency optimization, compact structural design, and long-term

durability under automotive vibration and temperature cycles.

The new energy vehicle heater market is experiencing rapid growth driven by accelerating EV adoption globally. Unlike internal combustion engine vehicles that utilize waste heat, EVs rely entirely on electric heating systems for cabin comfort and battery thermal regulation. Cold climate performance requirements significantly increase heater demand, especially in Europe and North America. Technological development is shifting toward integrated thermal management modules that combine PTC heaters, heat pumps, and coolant circuits to improve overall energy efficiency. While basic PTC heaters face cost pressure due to large-scale production, high-voltage integrated systems and intelligent control modules maintain stronger profitability. Over the next five years, expansion of 800V platforms and improvements in winter driving range optimization will further drive innovation and market growth in NEV heating systems.

This report studies the global New Energy Vehicle Heater production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for New Energy Vehicle Heater 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 New Energy Vehicle Heater that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global New Energy Vehicle Heater total production and demand, 2021-2032, (K Units)

Global New Energy Vehicle Heater total production value, 2021-2032, (USD Million)

Global New Energy Vehicle Heater production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global New Energy Vehicle Heater consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: New Energy Vehicle Heater domestic production, consumption, key domestic manufacturers and share

Global New Energy Vehicle Heater production by manufacturer, production, price, value

and market share 2021-2026, (USD Million) & (K Units)

Global New Energy Vehicle Heater production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global New Energy Vehicle Heater production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global New Energy Vehicle Heater 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 Webasto Group, BorgWarner, Huagong Tech, DBK Group, Eberspacher, Woory Corporation, Mahle, Dongfang Electric Heating, Suzhou Xinye Electronics, KLC, 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 New Energy Vehicle Heater 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 New Energy Vehicle Heater Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global New Energy Vehicle Heater Market, Segmentation by Type:

PTC Air Heater

PTC Water Heater

TFE Heater

Other Heater

Global New Energy Vehicle Heater Market, Segmentation by Voltage Level:

400 V

800 V

Global New Energy Vehicle Heater Market, Segmentation by Power Range:

Low Power (2–3 kW) Heater

Medium Power (3–6 kW) Heater

High Power (6–10 kW) Heater

Global New Energy Vehicle Heater Market, Segmentation by Application:

BEV

PHEV

Companies Profiled:

Webasto Group

BorgWarner

Huagong Tech

DBK Group

Eberspacher

Woory Corporation

Mahle

Dongfang Electric Heating

Suzhou Xinye Electronics

KLC

Mitsubishi Heavy Industries

Jahwa Electronics

Valeo

KUS

Key Questions Answered:

1. How big is the global New Energy Vehicle Heater market?
2. What is the demand of the global New Energy Vehicle Heater market?
3. What is the year over year growth of the global New Energy Vehicle Heater market?

4. What is the production and production value of the global New Energy Vehicle Heater market?
5. Who are the key producers in the global New Energy Vehicle Heater market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World New Energy Vehicle Heater Demand (2021-2032)
- 2.2 World New Energy Vehicle Heater Consumption by Region
 - 2.2.1 World New Energy Vehicle Heater Consumption by Region (2021-2026)
 - 2.2.2 World New Energy Vehicle Heater Consumption Forecast by Region (2027-2032)
- 2.3 United States New Energy Vehicle Heater Consumption (2021-2032)
- 2.4 China New Energy Vehicle Heater Consumption (2021-2032)
- 2.5 Europe New Energy Vehicle Heater Consumption (2021-2032)
- 2.6 Japan New Energy Vehicle Heater Consumption (2021-2032)
- 2.7 South Korea New Energy Vehicle Heater Consumption (2021-2032)
- 2.8 ASEAN New Energy Vehicle Heater Consumption (2021-2032)
- 2.9 India New Energy Vehicle Heater Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World New Energy Vehicle Heater Production Value by Manufacturer (2021-2026)
- 3.2 World New Energy Vehicle Heater Production by Manufacturer (2021-2026)
- 3.3 World New Energy Vehicle Heater Average Price by Manufacturer (2021-2026)
- 3.4 New Energy Vehicle Heater Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global New Energy Vehicle Heater Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for New Energy Vehicle Heater in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for New Energy Vehicle Heater in 2025
- 3.6 New Energy Vehicle Heater Market: Overall Company Footprint Analysis
 - 3.6.1 New Energy Vehicle Heater Market: Region Footprint
 - 3.6.2 New Energy Vehicle Heater Market: Company Product Type Footprint
 - 3.6.3 New Energy Vehicle Heater 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: New Energy Vehicle Heater Production Value Comparison
 - 4.1.1 United States VS China: New Energy Vehicle Heater Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: New Energy Vehicle Heater Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: New Energy Vehicle Heater Production Comparison
 - 4.2.1 United States VS China: New Energy Vehicle Heater Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: New Energy Vehicle Heater Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: New Energy Vehicle Heater Consumption Comparison
 - 4.3.1 United States VS China: New Energy Vehicle Heater Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: New Energy Vehicle Heater Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based New Energy Vehicle Heater Manufacturers and Market Share,

2021-2026

4.4.1 United States Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers New Energy Vehicle Heater Production Value (2021-2026)

4.4.3 United States Based Manufacturers New Energy Vehicle Heater Production (2021-2026)

4.5 China Based New Energy Vehicle Heater Manufacturers and Market Share

4.5.1 China Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers New Energy Vehicle Heater Production Value (2021-2026)

4.5.3 China Based Manufacturers New Energy Vehicle Heater Production (2021-2026)

4.6 Rest of World Based New Energy Vehicle Heater Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers New Energy Vehicle Heater Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers New Energy Vehicle Heater Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World New Energy Vehicle Heater Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 PTC Air Heater

5.2.2 PTC Water Heater

5.2.3 TFE Heater

5.2.4 Other Heater

5.3 Market Segment by Type

5.3.1 World New Energy Vehicle Heater Production by Type (2021-2032)

5.3.2 World New Energy Vehicle Heater Production Value by Type (2021-2032)

5.3.3 World New Energy Vehicle Heater Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY VOLTAGE LEVEL

6.1 World New Energy Vehicle Heater Market Size Overview by Voltage Level: 2021 VS

2025 VS 2032

6.2 Segment Introduction by Voltage Level

6.2.1 400 V

6.2.2 800 V

6.3 Market Segment by Voltage Level

6.3.1 World New Energy Vehicle Heater Production by Voltage Level (2021-2032)

6.3.2 World New Energy Vehicle Heater Production Value by Voltage Level
(2021-2032)

6.3.3 World New Energy Vehicle Heater Average Price by Voltage Level (2021-2032)

7 MARKET ANALYSIS BY POWER RANGE

7.1 World New Energy Vehicle Heater Market Size Overview by Power Range: 2021 VS
2025 VS 2032

7.2 Segment Introduction by Power Range

7.2.1 Low Power (2–3 kW) Heater

7.2.2 Medium Power (3–6 kW) Heater

7.2.3 High Power (6–10 kW) Heater

7.3 Market Segment by Power Range

7.3.1 World New Energy Vehicle Heater Production by Power Range (2021-2032)

7.3.2 World New Energy Vehicle Heater Production Value by Power Range
(2021-2032)

7.3.3 World New Energy Vehicle Heater Average Price by Power Range (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World New Energy Vehicle Heater 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 New Energy Vehicle Heater Production by Application (2021-2032)

8.3.2 World New Energy Vehicle Heater Production Value by Application (2021-2032)

8.3.3 World New Energy Vehicle Heater Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Webasto Group

- 9.1.1 Webasto Group Details
- 9.1.2 Webasto Group Major Business
- 9.1.3 Webasto Group New Energy Vehicle Heater Product and Services
- 9.1.4 Webasto Group New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 Webasto Group Recent Developments/Updates
- 9.1.6 Webasto Group Competitive Strengths & Weaknesses
- 9.2 BorgWarner
 - 9.2.1 BorgWarner Details
 - 9.2.2 BorgWarner Major Business
 - 9.2.3 BorgWarner New Energy Vehicle Heater Product and Services
 - 9.2.4 BorgWarner New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 BorgWarner Recent Developments/Updates
 - 9.2.6 BorgWarner Competitive Strengths & Weaknesses
- 9.3 Huagong Tech
 - 9.3.1 Huagong Tech Details
 - 9.3.2 Huagong Tech Major Business
 - 9.3.3 Huagong Tech New Energy Vehicle Heater Product and Services
 - 9.3.4 Huagong Tech New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Huagong Tech Recent Developments/Updates
 - 9.3.6 Huagong Tech Competitive Strengths & Weaknesses
- 9.4 DBK Group
 - 9.4.1 DBK Group Details
 - 9.4.2 DBK Group Major Business
 - 9.4.3 DBK Group New Energy Vehicle Heater Product and Services
 - 9.4.4 DBK Group New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 DBK Group Recent Developments/Updates
 - 9.4.6 DBK Group Competitive Strengths & Weaknesses
- 9.5 Eberspacher
 - 9.5.1 Eberspacher Details
 - 9.5.2 Eberspacher Major Business
 - 9.5.3 Eberspacher New Energy Vehicle Heater Product and Services
 - 9.5.4 Eberspacher New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Eberspacher Recent Developments/Updates
 - 9.5.6 Eberspacher Competitive Strengths & Weaknesses

9.6 Woory Corporation

9.6.1 Woory Corporation Details

9.6.2 Woory Corporation Major Business

9.6.3 Woory Corporation New Energy Vehicle Heater Product and Services

9.6.4 Woory Corporation New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Woory Corporation Recent Developments/Updates

9.6.6 Woory Corporation Competitive Strengths & Weaknesses

9.7 Mahle

9.7.1 Mahle Details

9.7.2 Mahle Major Business

9.7.3 Mahle New Energy Vehicle Heater Product and Services

9.7.4 Mahle New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Mahle Recent Developments/Updates

9.7.6 Mahle Competitive Strengths & Weaknesses

9.8 Dongfang Electric Heating

9.8.1 Dongfang Electric Heating Details

9.8.2 Dongfang Electric Heating Major Business

9.8.3 Dongfang Electric Heating New Energy Vehicle Heater Product and Services

9.8.4 Dongfang Electric Heating New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Dongfang Electric Heating Recent Developments/Updates

9.8.6 Dongfang Electric Heating Competitive Strengths & Weaknesses

9.9 Suzhou Xinye Electronics

9.9.1 Suzhou Xinye Electronics Details

9.9.2 Suzhou Xinye Electronics Major Business

9.9.3 Suzhou Xinye Electronics New Energy Vehicle Heater Product and Services

9.9.4 Suzhou Xinye Electronics New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Suzhou Xinye Electronics Recent Developments/Updates

9.9.6 Suzhou Xinye Electronics Competitive Strengths & Weaknesses

9.10 KLC

9.10.1 KLC Details

9.10.2 KLC Major Business

9.10.3 KLC New Energy Vehicle Heater Product and Services

9.10.4 KLC New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 KLC Recent Developments/Updates

- 9.10.6 KLC Competitive Strengths & Weaknesses
- 9.11 Mitsubishi Heavy Industries
 - 9.11.1 Mitsubishi Heavy Industries Details
 - 9.11.2 Mitsubishi Heavy Industries Major Business
 - 9.11.3 Mitsubishi Heavy Industries New Energy Vehicle Heater Product and Services
 - 9.11.4 Mitsubishi Heavy Industries New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Mitsubishi Heavy Industries Recent Developments/Updates
 - 9.11.6 Mitsubishi Heavy Industries Competitive Strengths & Weaknesses
- 9.12 Jahwa Electronics
 - 9.12.1 Jahwa Electronics Details
 - 9.12.2 Jahwa Electronics Major Business
 - 9.12.3 Jahwa Electronics New Energy Vehicle Heater Product and Services
 - 9.12.4 Jahwa Electronics New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Jahwa Electronics Recent Developments/Updates
 - 9.12.6 Jahwa Electronics Competitive Strengths & Weaknesses
- 9.13 Valeo
 - 9.13.1 Valeo Details
 - 9.13.2 Valeo Major Business
 - 9.13.3 Valeo New Energy Vehicle Heater Product and Services
 - 9.13.4 Valeo New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Valeo Recent Developments/Updates
 - 9.13.6 Valeo Competitive Strengths & Weaknesses
- 9.14 KUS
 - 9.14.1 KUS Details
 - 9.14.2 KUS Major Business
 - 9.14.3 KUS New Energy Vehicle Heater Product and Services
 - 9.14.4 KUS New Energy Vehicle Heater Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 KUS Recent Developments/Updates
 - 9.14.6 KUS Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 New Energy Vehicle Heater Industry Chain
- 10.2 New Energy Vehicle Heater Upstream Analysis
 - 10.2.1 New Energy Vehicle Heater Core Raw Materials

- 10.2.2 Main Manufacturers of New Energy Vehicle Heater Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 New Energy Vehicle Heater Production Mode
- 10.6 New Energy Vehicle Heater Procurement Model
- 10.7 New Energy Vehicle Heater Industry Sales Model and Sales Channels
 - 10.7.1 New Energy Vehicle Heater Sales Model
 - 10.7.2 New Energy Vehicle Heater 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 New Energy Vehicle Heater Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World New Energy Vehicle Heater Production Value by Region (2021-2026) & (USD Million)

Table 3. World New Energy Vehicle Heater Production Value by Region (2027-2032) & (USD Million)

Table 4. World New Energy Vehicle Heater Production Value Market Share by Region (2021-2026)

Table 5. World New Energy Vehicle Heater Production Value Market Share by Region (2027-2032)

Table 6. World New Energy Vehicle Heater Production by Region (2021-2026) & (K Units)

Table 7. World New Energy Vehicle Heater Production by Region (2027-2032) & (K Units)

Table 8. World New Energy Vehicle Heater Production Market Share by Region (2021-2026)

Table 9. World New Energy Vehicle Heater Production Market Share by Region (2027-2032)

Table 10. World New Energy Vehicle Heater Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World New Energy Vehicle Heater Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. New Energy Vehicle Heater Major Market Trends

Table 13. World New Energy Vehicle Heater Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World New Energy Vehicle Heater Consumption by Region (2021-2026) & (K Units)

Table 15. World New Energy Vehicle Heater Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World New Energy Vehicle Heater Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key New Energy Vehicle Heater Producers in 2025

Table 18. World New Energy Vehicle Heater Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key New Energy Vehicle Heater Producers in 2025

Table 20. World New Energy Vehicle Heater Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global New Energy Vehicle Heater Company Evaluation Quadrant

Table 22. World New Energy Vehicle Heater Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and New Energy Vehicle Heater Production Site of Key Manufacturer

Table 24. New Energy Vehicle Heater Market: Company Product Type Footprint

Table 25. New Energy Vehicle Heater Market: Company Product Application Footprint

Table 26. New Energy Vehicle Heater Competitive Factors

Table 27. New Energy Vehicle Heater New Entrant and Capacity Expansion Plans

Table 28. New Energy Vehicle Heater Mergers & Acquisitions Activity

Table 29. United States VS China New Energy Vehicle Heater Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China New Energy Vehicle Heater Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China New Energy Vehicle Heater Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers New Energy Vehicle Heater Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers New Energy Vehicle Heater Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers New Energy Vehicle Heater Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers New Energy Vehicle Heater Production Market Share (2021-2026)

Table 37. China Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers New Energy Vehicle Heater Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers New Energy Vehicle Heater Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers New Energy Vehicle Heater Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers New Energy Vehicle Heater Production Market

Share (2021-2026)

Table 42. Rest of World Based New Energy Vehicle Heater Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers New Energy Vehicle Heater Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers New Energy Vehicle Heater Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers New Energy Vehicle Heater Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers New Energy Vehicle Heater Production Market Share (2021-2026)

Table 47. World New Energy Vehicle Heater Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World New Energy Vehicle Heater Production by Type (2021-2026) & (K Units)

Table 49. World New Energy Vehicle Heater Production by Type (2027-2032) & (K Units)

Table 50. World New Energy Vehicle Heater Production Value by Type (2021-2026) & (USD Million)

Table 51. World New Energy Vehicle Heater Production Value by Type (2027-2032) & (USD Million)

Table 52. World New Energy Vehicle Heater Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World New Energy Vehicle Heater Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World New Energy Vehicle Heater Production Value by Voltage Level, (USD Million), 2021 & 2025 & 2032

Table 55. World New Energy Vehicle Heater Production by Voltage Level (2021-2026) & (K Units)

Table 56. World New Energy Vehicle Heater Production by Voltage Level (2027-2032) & (K Units)

Table 57. World New Energy Vehicle Heater Production Value by Voltage Level (2021-2026) & (USD Million)

Table 58. World New Energy Vehicle Heater Production Value by Voltage Level (2027-2032) & (USD Million)

Table 59. World New Energy Vehicle Heater Average Price by Voltage Level (2021-2026) & (US\$/Unit)

Table 60. World New Energy Vehicle Heater Average Price by Voltage Level (2027-2032) & (US\$/Unit)

Table 61. World New Energy Vehicle Heater Production Value by Power Range, (USD Million), 2021 & 2025 & 2032

Table 62. World New Energy Vehicle Heater Production by Power Range (2021-2026) & (K Units)

Table 63. World New Energy Vehicle Heater Production by Power Range (2027-2032) & (K Units)

Table 64. World New Energy Vehicle Heater Production Value by Power Range (2021-2026) & (USD Million)

Table 65. World New Energy Vehicle Heater Production Value by Power Range (2027-2032) & (USD Million)

Table 66. World New Energy Vehicle Heater Average Price by Power Range (2021-2026) & (US\$/Unit)

Table 67. World New Energy Vehicle Heater Average Price by Power Range (2027-2032) & (US\$/Unit)

Table 68. World New Energy Vehicle Heater Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World New Energy Vehicle Heater Production by Application (2021-2026) & (K Units)

Table 70. World New Energy Vehicle Heater Production by Application (2027-2032) & (K Units)

Table 71. World New Energy Vehicle Heater Production Value by Application (2021-2026) & (USD Million)

Table 72. World New Energy Vehicle Heater Production Value by Application (2027-2032) & (USD Million)

Table 73. World New Energy Vehicle Heater Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World New Energy Vehicle Heater Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Webasto Group Basic Information, Manufacturing Base and Competitors

Table 76. Webasto Group Major Business

Table 77. Webasto Group New Energy Vehicle Heater Product and Services

Table 78. Webasto Group New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Webasto Group Recent Developments/Updates

Table 80. Webasto Group Competitive Strengths & Weaknesses

Table 81. BorgWarner Basic Information, Manufacturing Base and Competitors

Table 82. BorgWarner Major Business

Table 83. BorgWarner New Energy Vehicle Heater Product and Services

Table 84. BorgWarner New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. BorgWarner Recent Developments/Updates

Table 86. BorgWarner Competitive Strengths & Weaknesses

Table 87. Huagong Tech Basic Information, Manufacturing Base and Competitors

Table 88. Huagong Tech Major Business

Table 89. Huagong Tech New Energy Vehicle Heater Product and Services

Table 90. Huagong Tech New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Huagong Tech Recent Developments/Updates

Table 92. Huagong Tech Competitive Strengths & Weaknesses

Table 93. DBK Group Basic Information, Manufacturing Base and Competitors

Table 94. DBK Group Major Business

Table 95. DBK Group New Energy Vehicle Heater Product and Services

Table 96. DBK Group New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. DBK Group Recent Developments/Updates

Table 98. DBK Group Competitive Strengths & Weaknesses

Table 99. Eberspacher Basic Information, Manufacturing Base and Competitors

Table 100. Eberspacher Major Business

Table 101. Eberspacher New Energy Vehicle Heater Product and Services

Table 102. Eberspacher New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Eberspacher Recent Developments/Updates

Table 104. Eberspacher Competitive Strengths & Weaknesses

Table 105. Woory Corporation Basic Information, Manufacturing Base and Competitors

Table 106. Woory Corporation Major Business

Table 107. Woory Corporation New Energy Vehicle Heater Product and Services

Table 108. Woory Corporation New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Woory Corporation Recent Developments/Updates

Table 110. Woory Corporation Competitive Strengths & Weaknesses

Table 111. Mahle Basic Information, Manufacturing Base and Competitors

Table 112. Mahle Major Business

- Table 113. Mahle New Energy Vehicle Heater Product and Services
- Table 114. Mahle New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Mahle Recent Developments/Updates
- Table 116. Mahle Competitive Strengths & Weaknesses
- Table 117. Dongfang Electric Heating Basic Information, Manufacturing Base and Competitors
- Table 118. Dongfang Electric Heating Major Business
- Table 119. Dongfang Electric Heating New Energy Vehicle Heater Product and Services
- Table 120. Dongfang Electric Heating New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Dongfang Electric Heating Recent Developments/Updates
- Table 122. Dongfang Electric Heating Competitive Strengths & Weaknesses
- Table 123. Suzhou Xinye Electronics Basic Information, Manufacturing Base and Competitors
- Table 124. Suzhou Xinye Electronics Major Business
- Table 125. Suzhou Xinye Electronics New Energy Vehicle Heater Product and Services
- Table 126. Suzhou Xinye Electronics New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Suzhou Xinye Electronics Recent Developments/Updates
- Table 128. Suzhou Xinye Electronics Competitive Strengths & Weaknesses
- Table 129. KLC Basic Information, Manufacturing Base and Competitors
- Table 130. KLC Major Business
- Table 131. KLC New Energy Vehicle Heater Product and Services
- Table 132. KLC New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. KLC Recent Developments/Updates
- Table 134. KLC Competitive Strengths & Weaknesses
- Table 135. Mitsubishi Heavy Industries Basic Information, Manufacturing Base and Competitors
- Table 136. Mitsubishi Heavy Industries Major Business
- Table 137. Mitsubishi Heavy Industries New Energy Vehicle Heater Product and Services
- Table 138. Mitsubishi Heavy Industries New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Mitsubishi Heavy Industries Recent Developments/Updates

- Table 140. Mitsubishi Heavy Industries Competitive Strengths & Weaknesses
- Table 141. Jahwa Electronics Basic Information, Manufacturing Base and Competitors
- Table 142. Jahwa Electronics Major Business
- Table 143. Jahwa Electronics New Energy Vehicle Heater Product and Services
- Table 144. Jahwa Electronics New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Jahwa Electronics Recent Developments/Updates
- Table 146. Jahwa Electronics Competitive Strengths & Weaknesses
- Table 147. Valeo Basic Information, Manufacturing Base and Competitors
- Table 148. Valeo Major Business
- Table 149. Valeo New Energy Vehicle Heater Product and Services
- Table 150. Valeo New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Valeo Recent Developments/Updates
- Table 152. Valeo Competitive Strengths & Weaknesses
- Table 153. KUS Basic Information, Manufacturing Base and Competitors
- Table 154. KUS Major Business
- Table 155. KUS New Energy Vehicle Heater Product and Services
- Table 156. KUS New Energy Vehicle Heater Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. KUS Recent Developments/Updates
- Table 158. KUS Competitive Strengths & Weaknesses
- Table 159. Global Key Players of New Energy Vehicle Heater Upstream (Raw Materials)
- Table 160. Global New Energy Vehicle Heater Typical Customers
- Table 161. New Energy Vehicle Heater Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. New Energy Vehicle Heater Picture

Figure 2. World New Energy Vehicle Heater Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World New Energy Vehicle Heater Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 5. World New Energy Vehicle Heater Average Price (2021-2032) & (US\$/Unit)

Figure 6. World New Energy Vehicle Heater Production Value Market Share by Region (2021-2032)

Figure 7. World New Energy Vehicle Heater Production Market Share by Region (2021-2032)

Figure 8. North America New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 9. Europe New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 10. China New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 11. Japan New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 12. South Korea New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 13. India New Energy Vehicle Heater Production (2021-2032) & (K Units)

Figure 14. New Energy Vehicle Heater Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 17. World New Energy Vehicle Heater Consumption Market Share by Region (2021-2032)

Figure 18. United States New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 19. China New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 20. Europe New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 21. Japan New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 22. South Korea New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 23. ASEAN New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 24. India New Energy Vehicle Heater Consumption (2021-2032) & (K Units)

Figure 25. Producer Shipments of New Energy Vehicle Heater by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for New Energy Vehicle Heater

Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for New Energy Vehicle Heater Markets in 2025

Figure 28. United States VS China: New Energy Vehicle Heater Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: New Energy Vehicle Heater Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: New Energy Vehicle Heater Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers New Energy Vehicle Heater Production Market Share 2025

Figure 32. China Based Manufacturers New Energy Vehicle Heater Production Market Share 2025

Figure 33. Rest of World Based Manufacturers New Energy Vehicle Heater Production Market Share 2025

Figure 34. World New Energy Vehicle Heater Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World New Energy Vehicle Heater Production Value Market Share by Type in 2025

Figure 36. PTC Air Heater

Figure 37. PTC Water Heater

Figure 38. TFE Heater

Figure 39. Other Heater

Figure 40. World New Energy Vehicle Heater Production Market Share by Type (2021-2032)

Figure 41. World New Energy Vehicle Heater Production Value Market Share by Type (2021-2032)

Figure 42. World New Energy Vehicle Heater Average Price by Type (2021-2032) & (US\$/Unit)

Figure 43. World New Energy Vehicle Heater Production Value by Voltage Level, (USD Million), 2021 & 2025 & 2032

Figure 44. World New Energy Vehicle Heater Production Value Market Share by Voltage Level in 2025

Figure 45. 400 V

Figure 46. 800 V

Figure 47. World New Energy Vehicle Heater Production Market Share by Voltage Level (2021-2032)

Figure 48. World New Energy Vehicle Heater Production Value Market Share by Voltage Level (2021-2032)

- Figure 49. World New Energy Vehicle Heater Average Price by Voltage Level (2021-2032) & (US\$/Unit)
- Figure 50. World New Energy Vehicle Heater Production Value by Power Range, (USD Million), 2021 & 2025 & 2032
- Figure 51. World New Energy Vehicle Heater Production Value Market Share by Power Range in 2025
- Figure 52. Low Power (2–3 kW) Heater
- Figure 53. Medium Power (3–6 kW) Heater
- Figure 54. High Power (6–10 kW) Heater
- Figure 55. World New Energy Vehicle Heater Production Market Share by Power Range (2021-2032)
- Figure 56. World New Energy Vehicle Heater Production Value Market Share by Power Range (2021-2032)
- Figure 57. World New Energy Vehicle Heater Average Price by Power Range (2021-2032) & (US\$/Unit)
- Figure 58. World New Energy Vehicle Heater Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 59. World New Energy Vehicle Heater Production Value Market Share by Application in 2025
- Figure 60. BEV
- Figure 61. PHEV
- Figure 62. World New Energy Vehicle Heater Production Market Share by Application (2021-2032)
- Figure 63. World New Energy Vehicle Heater Production Value Market Share by Application (2021-2032)
- Figure 64. World New Energy Vehicle Heater Average Price by Application (2021-2032) & (US\$/Unit)
- Figure 65. New Energy Vehicle Heater Industry Chain
- Figure 66. New Energy Vehicle Heater Procurement Model
- Figure 67. New Energy Vehicle Heater Sales Model
- Figure 68. New Energy Vehicle Heater Sales Channels, Direct Sales, and Distribution
- Figure 69. Methodology
- Figure 70. Research Process and Data Source

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