

# Global Semiconductor Peltier Module Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Semiconductor Peltier Module market size is expected to reach \$ 1731 million by 2032, rising at a market growth of 8.5% CAGR during the forecast period (2026-2032).

In 2025, global Semiconductor Peltier Module production reached approximately 226573 K Pcs, with an average global market price of around 4149 USD per K Pcs.

A Semiconductor Peltier Module is a solid-state thermal management device that uses the Peltier effect to provide active cooling and precise temperature control. It is typically constructed with multiple pairs of P-type and N-type thermoelectric semiconductor elements, electrodes, ceramic substrates, and thermal interface structures. When direct current is applied, a temperature difference is generated across the module, enabling one side to absorb heat while the other side releases heat. These devices are characterized by compact size, fast response, no moving parts, refrigerant-free operation, and reversible cooling/heating capability through current direction control. They are widely used in optical communication components, lasers, semiconductor equipment, medical and laboratory instruments, automotive thermal management, consumer electronics, industrial sensors, and aerospace and defense electronics where localized cooling, stable temperature control, or thermal cycling is required.

The upstream raw materials for Semiconductor Peltier Module mainly include bismuth telluride, extruded aluminum, plastic granules, and copper-clad laminates. Major suppliers include Furukawa, Rogers, Tong Hsing, Ortech, Shanghai Vital, ABSCO Limited, RusTec, Reade, ESPI Metals, and Vital Materials. Downstream applications include consumer electronics, communications, medical, automotive, industrial, and defense/aerospace fields. Typical customers include Gentherm, Thermo Fisher

Scientific, Agilent Technologies, Coherent, Lumentum, Ericsson, Nokia, Roche, Siemens, Huawei, ZTE, Bosch, Continental, Haier, and Midea.

Single-line production capacity for Semiconductor Peltier Module ranges from 500,000 to 1,000,000 Pcs, varying depending on production scale, technology, and manufacturers. Gross profit margins are between 30% and 40%.

From a supply perspective, the global Semiconductor Peltier Module industry exhibits a competitive structure where 'Japan and Europe control high-end materials, reliability, and application solutions, while China accelerates large-scale manufacturing and domestic substitution.' Companies such as Ferrotec, KELK, Kyocera, Coherent, Tark Thermal Solutions, and Phononic have strong brand recognition and customer bases in optical communication, medical, industrial, and high-reliability temperature control applications. Meanwhile, Chinese manufacturers are expanding rapidly in standard TEC, Micro TEC, thermoelectric systems, and complete system applications, with many Chinese companies having established relatively clear local manufacturing chains. In terms of regional competition, leading customers still prioritize material consistency, cycle life, reliability verification, and batch delivery stability. Therefore, in the short term, the global high-end market will still be dominated by leading Japanese, American, and European companies, but in the medium to long term, the influence of Chinese companies in terms of cost, production capacity, and local support will continue to increase.

From a demand structure perspective, the growth of Semiconductor Peltier Module is gradually shifting from traditional consumer small appliances and general electronic cooling to higher-value precision temperature control scenarios. Fields such as optical modules, lasers, infrared detection, medical testing, semiconductor equipment, automotive batteries, and seat temperature control have higher requirements for temperature stability, size, response speed, and reliability, thus making it easier to support high-priced and customized demands. Kyocera's 2024 Peltier module launch, which raised maximum heat absorption by 21% compared to its conventional products and highlighted automotive battery and seat temperature control applications, shows that automotive thermal management is becoming a more visible growth area for the technology. At the same time, AI computing, 800G/1.6T optical networking, and rising power density in photonic and electronic systems are increasing demand for compact heat management at the device and module level. Phononic's OFC 2025 positioning around solid-state thermal solutions for next-generation AI servers, networks, and data centers, along with its statement of more than 25 million TECs deployed, indicates that communications and data infrastructure are becoming more important to the industry's

growth narrative.

From a product roadmap perspective, the focus of industry competition is shifting from simply 'cooling' to comprehensive capabilities including 'high heat flux density, low power consumption, high cycle life, long lifespan reliability, and system-level thermal management integration.' Coherent launched its CT-Series thermoelectric coolers in 2025, emphasizing their ability to support up to 100,000 thermal cycles. Positioned for mid-range reliability applications—better than conventional product lines but lower than those with extreme cycling requirements—this demonstrates that leading international companies are stratifying their products to cover different reliability and cost ranges. Meanwhile, on the materials side, development continues to focus on Bi<sub>2</sub>Te<sub>3</sub>-based thermoelectric materials, ceramic substrates, welding processes, grain consistency, and packaging reliability optimization. On the application side, the focus is shifting from individual modules to the integration of cold plates, liquid cooling, temperature controllers, and complete system components. In terms of the policy environment, China's support for strategic emerging industries, green energy technologies, electronic information, and high-end manufacturing provides a foundation for continuous R&D and capacity expansion for domestic TEC (thermoelectric cooling) companies. However, the industry still faces competition from traditional compressor refrigeration, liquid cooling, heat pipe/vapor chamber, and advanced air-cooling solutions. In conclusion, the TEC industry will not become a universal replacement for all refrigeration scenarios in the future, but it will maintain definite growth in the areas of high precision, miniaturization, low vibration, and localized active temperature control.

This report studies the global Semiconductor Peltier Module production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Semiconductor Peltier Module 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 Semiconductor Peltier Module that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Semiconductor Peltier Module total production and demand, 2021-2032, (K Pcs)

Global Semiconductor Peltier Module total production value, 2021-2032, (USD Million)

Global Semiconductor Peltier Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Semiconductor Peltier Module consumption by region & country, CAGR,

2021-2032 & (K Pcs)

U.S. VS China: Semiconductor Peltier Module domestic production, consumption, key domestic manufacturers and share

Global Semiconductor Peltier Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Semiconductor Peltier Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Semiconductor Peltier Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Semiconductor Peltier Module 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 Ferrotec, KELK Ltd.(Komatsu), Coherent Corp (formerly II-VI Incorporated), Tark Thermal Solutions (formerly Laird Thermal Systems), KYOCERA, Phononic, Guangdong Fuxin Technology, ARCTIC TEC, KJLP, Thermion Company, 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 Semiconductor Peltier Module market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) 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 Semiconductor Peltier Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Semiconductor Peltier Module Market, Segmentation by Type:

Single-stage Type

Multi-stage Type

#### Global Semiconductor Peltier Module Market, Segmentation by Package Geometry:

Standard Type

Center-hole Type

Custom-shaped

Other

#### Global Semiconductor Peltier Module Market, Segmentation by Cooling Capacity (Qcmax):

50W Below

50-100W

100W Above

## Global Semiconductor Peltier Module Market, Segmentation by Application:

Consumer Electronics

Communication

Medical

Automotive

Industrial

Aerospace Defense

Others

## Companies Profiled:

Ferrotec

KELK Ltd.(Komatsu)

Coherent Corp (formerly II-VI Incorporated)

Tark Thermal Solutions (formerly Laird Thermal Systems)

KYOCERA

Phononic

Guangdong Fuxin Technology

ARCTIC TEC

KJLP

Thermion Company

Z-MAX

Zhejiang Wangu Semiconductor

Xianghe Oriental Electronic

Thermonamic Electronics

TE Technology

P&N Technology

AISIN Corporation

Sensor Controls Co., Ltd.

Wakefield Thermal

Same Sky (formerly CUI Devices)

TEC Microsystems GmbH

Peltron GmbH

Kryotherm Industries

Crystal Ltd

Liaoning Lengxin Technology

Thermoelectric new energy technology

Jianju Technology

Bi Sheng Semiconductor

Henan Hongchang Electronic

Wei County Zhongtian Electron Stock Cooperative

Beijing Xinyu Kaimeng Electronic Technology

Beijing Huimao Refrigeration Equipment

Hangzhou Aurin Cooling Device

Henan Guanjing Semiconductor Technology

Hubei Sagreon New Energy Technology

Key Questions Answered:

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

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

#### 4.4 United States Based Semiconductor Peltier Module Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Semiconductor Peltier Module Production Value (2021-2026)

4.4.3 United States Based Manufacturers Semiconductor Peltier Module Production (2021-2026)

#### 4.5 China Based Semiconductor Peltier Module Manufacturers and Market Share

4.5.1 China Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Semiconductor Peltier Module Production Value (2021-2026)

4.5.3 China Based Manufacturers Semiconductor Peltier Module Production (2021-2026)

#### 4.6 Rest of World Based Semiconductor Peltier Module Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Semiconductor Peltier Module Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Semiconductor Peltier Module Production (2021-2026)

### **5 MARKET ANALYSIS BY TYPE**

5.1 World Semiconductor Peltier Module Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Single-stage Type

5.2.2 Multi-stage Type

5.3 Market Segment by Type

5.3.1 World Semiconductor Peltier Module Production by Type (2021-2032)

5.3.2 World Semiconductor Peltier Module Production Value by Type (2021-2032)

5.3.3 World Semiconductor Peltier Module Average Price by Type (2021-2032)

### **6 MARKET ANALYSIS BY PACKAGE GEOMETRY**

6.1 World Semiconductor Peltier Module Market Size Overview by Package Geometry:

2021 VS 2025 VS 2032

6.2 Segment Introduction by Package Geometry

6.2.1 Standard Type

6.2.2 Center-hole Type

6.2.3 Custom-shaped

6.2.4 Other

6.3 Market Segment by Package Geometry

6.3.1 World Semiconductor Peltier Module Production by Package Geometry  
(2021-2032)

6.3.2 World Semiconductor Peltier Module Production Value by Package Geometry  
(2021-2032)

6.3.3 World Semiconductor Peltier Module Average Price by Package Geometry  
(2021-2032)

## **7 MARKET ANALYSIS BY COOLING CAPACITY (QCMAX)**

7.1 World Semiconductor Peltier Module Market Size Overview by Cooling Capacity  
(Qcmax): 2021 VS 2025 VS 2032

7.2 Segment Introduction by Cooling Capacity (Qcmax)

7.2.1 50W Below

7.2.2 50-100W

7.2.3 100W Above

7.3 Market Segment by Cooling Capacity (Qcmax)

7.3.1 World Semiconductor Peltier Module Production by Cooling Capacity (Qcmax)  
(2021-2032)

7.3.2 World Semiconductor Peltier Module Production Value by Cooling Capacity  
(Qcmax) (2021-2032)

7.3.3 World Semiconductor Peltier Module Average Price by Cooling Capacity  
(Qcmax) (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Semiconductor Peltier Module Market Size Overview by Application: 2021 VS  
2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Consumer Electronics

8.2.2 Communication

8.2.3 Medical

8.2.4 Automotive

8.2.5 Industrial

8.2.6 Aerospace Defense

8.2.7 Others

8.3 Market Segment by Application

8.3.1 World Semiconductor Peltier Module Production by Application (2021-2032)

8.3.2 World Semiconductor Peltier Module Production Value by Application (2021-2032)

8.3.3 World Semiconductor Peltier Module Average Price by Application (2021-2032)

## 9 COMPANY PROFILES

9.1 Ferrotec

9.1.1 Ferrotec Details

9.1.2 Ferrotec Major Business

9.1.3 Ferrotec Semiconductor Peltier Module Product and Services

9.1.4 Ferrotec Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Ferrotec Recent Developments/Updates

9.1.6 Ferrotec Competitive Strengths & Weaknesses

9.2 KELK Ltd.(Komatsu)

9.2.1 KELK Ltd.(Komatsu) Details

9.2.2 KELK Ltd.(Komatsu) Major Business

9.2.3 KELK Ltd.(Komatsu) Semiconductor Peltier Module Product and Services

9.2.4 KELK Ltd.(Komatsu) Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 KELK Ltd.(Komatsu) Recent Developments/Updates

9.2.6 KELK Ltd.(Komatsu) Competitive Strengths & Weaknesses

9.3 Coherent Corp (formerly II-VI Incorporated)

9.3.1 Coherent Corp (formerly II-VI Incorporated) Details

9.3.2 Coherent Corp (formerly II-VI Incorporated) Major Business

9.3.3 Coherent Corp (formerly II-VI Incorporated) Semiconductor Peltier Module Product and Services

9.3.4 Coherent Corp (formerly II-VI Incorporated) Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Coherent Corp (formerly II-VI Incorporated) Recent Developments/Updates

9.3.6 Coherent Corp (formerly II-VI Incorporated) Competitive Strengths & Weaknesses

9.4 Tark Thermal Solutions (formerly Laird Thermal Systems)

9.4.1 Tark Thermal Solutions (formerly Laird Thermal Systems) Details

- 9.4.2 Tark Thermal Solutions (formerly Laird Thermal Systems) Major Business
- 9.4.3 Tark Thermal Solutions (formerly Laird Thermal Systems) Semiconductor Peltier Module Product and Services
- 9.4.4 Tark Thermal Solutions (formerly Laird Thermal Systems) Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.4.5 Tark Thermal Solutions (formerly Laird Thermal Systems) Recent Developments/Updates
- 9.4.6 Tark Thermal Solutions (formerly Laird Thermal Systems) Competitive Strengths & Weaknesses
- 9.5 KYOCERA
  - 9.5.1 KYOCERA Details
  - 9.5.2 KYOCERA Major Business
  - 9.5.3 KYOCERA Semiconductor Peltier Module Product and Services
  - 9.5.4 KYOCERA Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 KYOCERA Recent Developments/Updates
  - 9.5.6 KYOCERA Competitive Strengths & Weaknesses
- 9.6 Phononic
  - 9.6.1 Phononic Details
  - 9.6.2 Phononic Major Business
  - 9.6.3 Phononic Semiconductor Peltier Module Product and Services
  - 9.6.4 Phononic Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 Phononic Recent Developments/Updates
  - 9.6.6 Phononic Competitive Strengths & Weaknesses
- 9.7 Guangdong Fuxin Technology
  - 9.7.1 Guangdong Fuxin Technology Details
  - 9.7.2 Guangdong Fuxin Technology Major Business
  - 9.7.3 Guangdong Fuxin Technology Semiconductor Peltier Module Product and Services
  - 9.7.4 Guangdong Fuxin Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Guangdong Fuxin Technology Recent Developments/Updates
  - 9.7.6 Guangdong Fuxin Technology Competitive Strengths & Weaknesses
- 9.8 ARCTIC TEC
  - 9.8.1 ARCTIC TEC Details
  - 9.8.2 ARCTIC TEC Major Business
  - 9.8.3 ARCTIC TEC Semiconductor Peltier Module Product and Services
  - 9.8.4 ARCTIC TEC Semiconductor Peltier Module Production, Price, Value, Gross

## Margin and Market Share (2021-2026)

9.8.5 ARCTIC TEC Recent Developments/Updates

9.8.6 ARCTIC TEC Competitive Strengths & Weaknesses

## 9.9 KJLP

9.9.1 KJLP Details

9.9.2 KJLP Major Business

9.9.3 KJLP Semiconductor Peltier Module Product and Services

9.9.4 KJLP Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 KJLP Recent Developments/Updates

9.9.6 KJLP Competitive Strengths & Weaknesses

## 9.10 Thermion Company

9.10.1 Thermion Company Details

9.10.2 Thermion Company Major Business

9.10.3 Thermion Company Semiconductor Peltier Module Product and Services

9.10.4 Thermion Company Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Thermion Company Recent Developments/Updates

9.10.6 Thermion Company Competitive Strengths & Weaknesses

## 9.11 Z-MAX

9.11.1 Z-MAX Details

9.11.2 Z-MAX Major Business

9.11.3 Z-MAX Semiconductor Peltier Module Product and Services

9.11.4 Z-MAX Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Z-MAX Recent Developments/Updates

9.11.6 Z-MAX Competitive Strengths & Weaknesses

## 9.12 Zhejiang Wangu Semiconductor

9.12.1 Zhejiang Wangu Semiconductor Details

9.12.2 Zhejiang Wangu Semiconductor Major Business

9.12.3 Zhejiang Wangu Semiconductor Semiconductor Peltier Module Product and Services

9.12.4 Zhejiang Wangu Semiconductor Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Zhejiang Wangu Semiconductor Recent Developments/Updates

9.12.6 Zhejiang Wangu Semiconductor Competitive Strengths & Weaknesses

## 9.13 Xianghe Oriental Electronic

9.13.1 Xianghe Oriental Electronic Details

9.13.2 Xianghe Oriental Electronic Major Business

9.13.3 Xianghe Oriental Electronic Semiconductor Peltier Module Product and Services

9.13.4 Xianghe Oriental Electronic Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Xianghe Oriental Electronic Recent Developments/Updates

9.13.6 Xianghe Oriental Electronic Competitive Strengths & Weaknesses

9.14 Thermonamic Electronics

9.14.1 Thermonamic Electronics Details

9.14.2 Thermonamic Electronics Major Business

9.14.3 Thermonamic Electronics Semiconductor Peltier Module Product and Services

9.14.4 Thermonamic Electronics Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Thermonamic Electronics Recent Developments/Updates

9.14.6 Thermonamic Electronics Competitive Strengths & Weaknesses

9.15 TE Technology

9.15.1 TE Technology Details

9.15.2 TE Technology Major Business

9.15.3 TE Technology Semiconductor Peltier Module Product and Services

9.15.4 TE Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 TE Technology Recent Developments/Updates

9.15.6 TE Technology Competitive Strengths & Weaknesses

9.16 P&N Technology

9.16.1 P&N Technology Details

9.16.2 P&N Technology Major Business

9.16.3 P&N Technology Semiconductor Peltier Module Product and Services

9.16.4 P&N Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 P&N Technology Recent Developments/Updates

9.16.6 P&N Technology Competitive Strengths & Weaknesses

9.17 AISIN Corporation

9.17.1 AISIN Corporation Details

9.17.2 AISIN Corporation Major Business

9.17.3 AISIN Corporation Semiconductor Peltier Module Product and Services

9.17.4 AISIN Corporation Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 AISIN Corporation Recent Developments/Updates

9.17.6 AISIN Corporation Competitive Strengths & Weaknesses

9.18 Sensor Controls Co., Ltd.

- 9.18.1 Sensor Controls Co., Ltd. Details
- 9.18.2 Sensor Controls Co., Ltd. Major Business
- 9.18.3 Sensor Controls Co., Ltd. Semiconductor Peltier Module Product and Services
- 9.18.4 Sensor Controls Co., Ltd. Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.18.5 Sensor Controls Co., Ltd. Recent Developments/Updates
- 9.18.6 Sensor Controls Co., Ltd. Competitive Strengths & Weaknesses
- 9.19 Wakefield Thermal
  - 9.19.1 Wakefield Thermal Details
  - 9.19.2 Wakefield Thermal Major Business
  - 9.19.3 Wakefield Thermal Semiconductor Peltier Module Product and Services
  - 9.19.4 Wakefield Thermal Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.19.5 Wakefield Thermal Recent Developments/Updates
  - 9.19.6 Wakefield Thermal Competitive Strengths & Weaknesses
- 9.20 Same Sky (formerly CUI Devices)
  - 9.20.1 Same Sky (formerly CUI Devices) Details
  - 9.20.2 Same Sky (formerly CUI Devices) Major Business
  - 9.20.3 Same Sky (formerly CUI Devices) Semiconductor Peltier Module Product and Services
  - 9.20.4 Same Sky (formerly CUI Devices) Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.20.5 Same Sky (formerly CUI Devices) Recent Developments/Updates
  - 9.20.6 Same Sky (formerly CUI Devices) Competitive Strengths & Weaknesses
- 9.21 TEC Microsystems GmbH
  - 9.21.1 TEC Microsystems GmbH Details
  - 9.21.2 TEC Microsystems GmbH Major Business
  - 9.21.3 TEC Microsystems GmbH Semiconductor Peltier Module Product and Services
  - 9.21.4 TEC Microsystems GmbH Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.21.5 TEC Microsystems GmbH Recent Developments/Updates
  - 9.21.6 TEC Microsystems GmbH Competitive Strengths & Weaknesses
- 9.22 Peltron GmbH
  - 9.22.1 Peltron GmbH Details
  - 9.22.2 Peltron GmbH Major Business
  - 9.22.3 Peltron GmbH Semiconductor Peltier Module Product and Services
  - 9.22.4 Peltron GmbH Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.22.5 Peltron GmbH Recent Developments/Updates

- 9.22.6 Peltron GmbH Competitive Strengths & Weaknesses
- 9.23 Kryotherm Industries
  - 9.23.1 Kryotherm Industries Details
  - 9.23.2 Kryotherm Industries Major Business
  - 9.23.3 Kryotherm Industries Semiconductor Peltier Module Product and Services
  - 9.23.4 Kryotherm Industries Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.23.5 Kryotherm Industries Recent Developments/Updates
  - 9.23.6 Kryotherm Industries Competitive Strengths & Weaknesses
- 9.24 Crystal Ltd
  - 9.24.1 Crystal Ltd Details
  - 9.24.2 Crystal Ltd Major Business
  - 9.24.3 Crystal Ltd Semiconductor Peltier Module Product and Services
  - 9.24.4 Crystal Ltd Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.24.5 Crystal Ltd Recent Developments/Updates
  - 9.24.6 Crystal Ltd Competitive Strengths & Weaknesses
- 9.25 Liaoning Lengxin Technology
  - 9.25.1 Liaoning Lengxin Technology Details
  - 9.25.2 Liaoning Lengxin Technology Major Business
  - 9.25.3 Liaoning Lengxin Technology Semiconductor Peltier Module Product and Services
  - 9.25.4 Liaoning Lengxin Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.25.5 Liaoning Lengxin Technology Recent Developments/Updates
  - 9.25.6 Liaoning Lengxin Technology Competitive Strengths & Weaknesses
- 9.26 Thermoelectric new energy technology
  - 9.26.1 Thermoelectric new energy technology Details
  - 9.26.2 Thermoelectric new energy technology Major Business
  - 9.26.3 Thermoelectric new energy technology Semiconductor Peltier Module Product and Services
  - 9.26.4 Thermoelectric new energy technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.26.5 Thermoelectric new energy technology Recent Developments/Updates
  - 9.26.6 Thermoelectric new energy technology Competitive Strengths & Weaknesses
- 9.27 Jianju Technology
  - 9.27.1 Jianju Technology Details
  - 9.27.2 Jianju Technology Major Business
  - 9.27.3 Jianju Technology Semiconductor Peltier Module Product and Services

9.27.4 Jianju Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.27.5 Jianju Technology Recent Developments/Updates

9.27.6 Jianju Technology Competitive Strengths & Weaknesses

9.28 Bi Sheng Semiconductor

9.28.1 Bi Sheng Semiconductor Details

9.28.2 Bi Sheng Semiconductor Major Business

9.28.3 Bi Sheng Semiconductor Semiconductor Peltier Module Product and Services

9.28.4 Bi Sheng Semiconductor Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.28.5 Bi Sheng Semiconductor Recent Developments/Updates

9.28.6 Bi Sheng Semiconductor Competitive Strengths & Weaknesses

9.29 Henan Hongchang Electronic

9.29.1 Henan Hongchang Electronic Details

9.29.2 Henan Hongchang Electronic Major Business

9.29.3 Henan Hongchang Electronic Semiconductor Peltier Module Product and Services

9.29.4 Henan Hongchang Electronic Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.29.5 Henan Hongchang Electronic Recent Developments/Updates

9.29.6 Henan Hongchang Electronic Competitive Strengths & Weaknesses

9.30 Wei County Zhongtian Electron Stock Cooperative

9.30.1 Wei County Zhongtian Electron Stock Cooperative Details

9.30.2 Wei County Zhongtian Electron Stock Cooperative Major Business

9.30.3 Wei County Zhongtian Electron Stock Cooperative Semiconductor Peltier Module Product and Services

9.30.4 Wei County Zhongtian Electron Stock Cooperative Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.30.5 Wei County Zhongtian Electron Stock Cooperative Recent Developments/Updates

9.30.6 Wei County Zhongtian Electron Stock Cooperative Competitive Strengths & Weaknesses

9.31 Beijing Xinyu Kaimeng Electronic Technology

9.31.1 Beijing Xinyu Kaimeng Electronic Technology Details

9.31.2 Beijing Xinyu Kaimeng Electronic Technology Major Business

9.31.3 Beijing Xinyu Kaimeng Electronic Technology Semiconductor Peltier Module Product and Services

9.31.4 Beijing Xinyu Kaimeng Electronic Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.31.5 Beijing Xinyu Kaimeng Electronic Technology Recent Developments/Updates
- 9.31.6 Beijing Xinyu Kaimeng Electronic Technology Competitive Strengths & Weaknesses
- 9.32 Beijing Huimao Refrigeration Equipment
  - 9.32.1 Beijing Huimao Refrigeration Equipment Details
  - 9.32.2 Beijing Huimao Refrigeration Equipment Major Business
  - 9.32.3 Beijing Huimao Refrigeration Equipment Semiconductor Peltier Module Product and Services
  - 9.32.4 Beijing Huimao Refrigeration Equipment Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.32.5 Beijing Huimao Refrigeration Equipment Recent Developments/Updates
  - 9.32.6 Beijing Huimao Refrigeration Equipment Competitive Strengths & Weaknesses
- 9.33 Hangzhou Aurin Cooling Device
  - 9.33.1 Hangzhou Aurin Cooling Device Details
  - 9.33.2 Hangzhou Aurin Cooling Device Major Business
  - 9.33.3 Hangzhou Aurin Cooling Device Semiconductor Peltier Module Product and Services
  - 9.33.4 Hangzhou Aurin Cooling Device Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.33.5 Hangzhou Aurin Cooling Device Recent Developments/Updates
  - 9.33.6 Hangzhou Aurin Cooling Device Competitive Strengths & Weaknesses
- 9.34 Henan Guanjing Semiconductor Technology
  - 9.34.1 Henan Guanjing Semiconductor Technology Details
  - 9.34.2 Henan Guanjing Semiconductor Technology Major Business
  - 9.34.3 Henan Guanjing Semiconductor Technology Semiconductor Peltier Module Product and Services
  - 9.34.4 Henan Guanjing Semiconductor Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.34.5 Henan Guanjing Semiconductor Technology Recent Developments/Updates
  - 9.34.6 Henan Guanjing Semiconductor Technology Competitive Strengths & Weaknesses
- 9.35 Hubei Sagreon New Energy Technology
  - 9.35.1 Hubei Sagreon New Energy Technology Details
  - 9.35.2 Hubei Sagreon New Energy Technology Major Business
  - 9.35.3 Hubei Sagreon New Energy Technology Semiconductor Peltier Module Product and Services
  - 9.35.4 Hubei Sagreon New Energy Technology Semiconductor Peltier Module Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.35.5 Hubei Sagreon New Energy Technology Recent Developments/Updates

### 9.35.6 Hubei Sagreon New Energy Technology Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

### 10.1 Semiconductor Peltier Module Industry Chain

### 10.2 Semiconductor Peltier Module Upstream Analysis

#### 10.2.1 Semiconductor Peltier Module Core Raw Materials

#### 10.2.2 Main Manufacturers of Semiconductor Peltier Module Core Raw Materials

### 10.3 Midstream Analysis

### 10.4 Downstream Analysis

### 10.5 Semiconductor Peltier Module Production Mode

### 10.6 Semiconductor Peltier Module Procurement Model

### 10.7 Semiconductor Peltier Module Industry Sales Model and Sales Channels

#### 10.7.1 Semiconductor Peltier Module Sales Model

#### 10.7.2 Semiconductor Peltier Module 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 Semiconductor Peltier Module Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Semiconductor Peltier Module Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Semiconductor Peltier Module Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Semiconductor Peltier Module Production Value Market Share by Region (2021-2026)
- Table 5. World Semiconductor Peltier Module Production Value Market Share by Region (2027-2032)
- Table 6. World Semiconductor Peltier Module Production by Region (2021-2026) & (K Pcs)
- Table 7. World Semiconductor Peltier Module Production by Region (2027-2032) & (K Pcs)
- Table 8. World Semiconductor Peltier Module Production Market Share by Region (2021-2026)
- Table 9. World Semiconductor Peltier Module Production Market Share by Region (2027-2032)
- Table 10. World Semiconductor Peltier Module Average Price by Region (2021-2026) & (US\$/Pcs)
- Table 11. World Semiconductor Peltier Module Average Price by Region (2027-2032) & (US\$/Pcs)
- Table 12. Semiconductor Peltier Module Major Market Trends
- Table 13. World Semiconductor Peltier Module Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Pcs)
- Table 14. World Semiconductor Peltier Module Consumption by Region (2021-2026) & (K Pcs)
- Table 15. World Semiconductor Peltier Module Consumption Forecast by Region (2027-2032) & (K Pcs)
- Table 16. World Semiconductor Peltier Module Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Semiconductor Peltier Module Producers in 2025
- Table 18. World Semiconductor Peltier Module Production by Manufacturer (2021-2026) & (K Pcs)

Table 19. Production Market Share of Key Semiconductor Peltier Module Producers in 2025

Table 20. World Semiconductor Peltier Module Average Price by Manufacturer (2021-2026) & (US\$/Pcs)

Table 21. Global Semiconductor Peltier Module Company Evaluation Quadrant

Table 22. World Semiconductor Peltier Module Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Semiconductor Peltier Module Production Site of Key Manufacturer

Table 24. Semiconductor Peltier Module Market: Company Product Type Footprint

Table 25. Semiconductor Peltier Module Market: Company Product Application Footprint

Table 26. Semiconductor Peltier Module Competitive Factors

Table 27. Semiconductor Peltier Module New Entrant and Capacity Expansion Plans

Table 28. Semiconductor Peltier Module Mergers & Acquisitions Activity

Table 29. United States VS China Semiconductor Peltier Module Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Semiconductor Peltier Module Production Comparison, (2021 & 2025 & 2032) & (K Pcs)

Table 31. United States VS China Semiconductor Peltier Module Consumption Comparison, (2021 & 2025 & 2032) & (K Pcs)

Table 32. United States Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Semiconductor Peltier Module Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Semiconductor Peltier Module Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Semiconductor Peltier Module Production (2021-2026) & (K Pcs)

Table 36. United States Based Manufacturers Semiconductor Peltier Module Production Market Share (2021-2026)

Table 37. China Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Semiconductor Peltier Module Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Semiconductor Peltier Module Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Semiconductor Peltier Module Production, (2021-2026) & (K Pcs)

Table 41. China Based Manufacturers Semiconductor Peltier Module Production Market Share (2021-2026)

Table 42. Rest of World Based Semiconductor Peltier Module Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Semiconductor Peltier Module Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Semiconductor Peltier Module Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Semiconductor Peltier Module Production, (2021-2026) & (K Pcs)

Table 46. Rest of World Based Manufacturers Semiconductor Peltier Module Production Market Share (2021-2026)

Table 47. World Semiconductor Peltier Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Semiconductor Peltier Module Production by Type (2021-2026) & (K Pcs)

Table 49. World Semiconductor Peltier Module Production by Type (2027-2032) & (K Pcs)

Table 50. World Semiconductor Peltier Module Production Value by Type (2021-2026) & (USD Million)

Table 51. World Semiconductor Peltier Module Production Value by Type (2027-2032) & (USD Million)

Table 52. World Semiconductor Peltier Module Average Price by Type (2021-2026) & (US\$/Pcs)

Table 53. World Semiconductor Peltier Module Average Price by Type (2027-2032) & (US\$/Pcs)

Table 54. World Semiconductor Peltier Module Production Value by Package Geometry, (USD Million), 2021 & 2025 & 2032

Table 55. World Semiconductor Peltier Module Production by Package Geometry (2021-2026) & (K Pcs)

Table 56. World Semiconductor Peltier Module Production by Package Geometry (2027-2032) & (K Pcs)

Table 57. World Semiconductor Peltier Module Production Value by Package Geometry (2021-2026) & (USD Million)

Table 58. World Semiconductor Peltier Module Production Value by Package Geometry (2027-2032) & (USD Million)

Table 59. World Semiconductor Peltier Module Average Price by Package Geometry (2021-2026) & (US\$/Pcs)

Table 60. World Semiconductor Peltier Module Average Price by Package Geometry

(2027-2032) & (US\$/Pcs)

Table 61. World Semiconductor Peltier Module Production Value by Cooling Capacity (Qcmax), (USD Million), 2021 & 2025 & 2032

Table 62. World Semiconductor Peltier Module Production by Cooling Capacity (Qcmax) (2021-2026) & (K Pcs)

Table 63. World Semiconductor Peltier Module Production by Cooling Capacity (Qcmax) (2027-2032) & (K Pcs)

Table 64. World Semiconductor Peltier Module Production Value by Cooling Capacity (Qcmax) (2021-2026) & (USD Million)

Table 65. World Semiconductor Peltier Module Production Value by Cooling Capacity (Qcmax) (2027-2032) & (USD Million)

Table 66. World Semiconductor Peltier Module Average Price by Cooling Capacity (Qcmax) (2021-2026) & (US\$/Pcs)

Table 67. World Semiconductor Peltier Module Average Price by Cooling Capacity (Qcmax) (2027-2032) & (US\$/Pcs)

Table 68. World Semiconductor Peltier Module Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Semiconductor Peltier Module Production by Application (2021-2026) & (K Pcs)

Table 70. World Semiconductor Peltier Module Production by Application (2027-2032) & (K Pcs)

Table 71. World Semiconductor Peltier Module Production Value by Application (2021-2026) & (USD Million)

Table 72. World Semiconductor Peltier Module Production Value by Application (2027-2032) & (USD Million)

Table 73. World Semiconductor Peltier Module Average Price by Application (2021-2026) & (US\$/Pcs)

Table 74. World Semiconductor Peltier Module Average Price by Application (2027-2032) & (US\$/Pcs)

Table 75. Ferrotec Basic Information, Manufacturing Base and Competitors

Table 76. Ferrotec Major Business

Table 77. Ferrotec Semiconductor Peltier Module Product and Services

Table 78. Ferrotec Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Ferrotec Recent Developments/Updates

Table 80. Ferrotec Competitive Strengths & Weaknesses

Table 81. KELK Ltd.(Komatsu) Basic Information, Manufacturing Base and Competitors

Table 82. KELK Ltd.(Komatsu) Major Business

Table 83. KELK Ltd.(Komatsu) Semiconductor Peltier Module Product and Services

Table 84. KELK Ltd.(Komatsu) Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. KELK Ltd.(Komatsu) Recent Developments/Updates

Table 86. KELK Ltd.(Komatsu) Competitive Strengths & Weaknesses

Table 87. Coherent Corp (formerly II-VI Incorporated) Basic Information, Manufacturing Base and Competitors

Table 88. Coherent Corp (formerly II-VI Incorporated) Major Business

Table 89. Coherent Corp (formerly II-VI Incorporated) Semiconductor Peltier Module Product and Services

Table 90. Coherent Corp (formerly II-VI Incorporated) Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Coherent Corp (formerly II-VI Incorporated) Recent Developments/Updates

Table 92. Coherent Corp (formerly II-VI Incorporated) Competitive Strengths & Weaknesses

Table 93. Tark Thermal Solutions (formerly Laird Thermal Systems) Basic Information, Manufacturing Base and Competitors

Table 94. Tark Thermal Solutions (formerly Laird Thermal Systems) Major Business

Table 95. Tark Thermal Solutions (formerly Laird Thermal Systems) Semiconductor Peltier Module Product and Services

Table 96. Tark Thermal Solutions (formerly Laird Thermal Systems) Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Tark Thermal Solutions (formerly Laird Thermal Systems) Recent Developments/Updates

Table 98. Tark Thermal Solutions (formerly Laird Thermal Systems) Competitive Strengths & Weaknesses

Table 99. KYOCERA Basic Information, Manufacturing Base and Competitors

Table 100. KYOCERA Major Business

Table 101. KYOCERA Semiconductor Peltier Module Product and Services

Table 102. KYOCERA Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. KYOCERA Recent Developments/Updates

Table 104. KYOCERA Competitive Strengths & Weaknesses

Table 105. Phononic Basic Information, Manufacturing Base and Competitors

Table 106. Phononic Major Business

Table 107. Phononic Semiconductor Peltier Module Product and Services

- Table 108. Phononic Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Phononic Recent Developments/Updates
- Table 110. Phononic Competitive Strengths & Weaknesses
- Table 111. Guangdong Fuxin Technology Basic Information, Manufacturing Base and Competitors
- Table 112. Guangdong Fuxin Technology Major Business
- Table 113. Guangdong Fuxin Technology Semiconductor Peltier Module Product and Services
- Table 114. Guangdong Fuxin Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Guangdong Fuxin Technology Recent Developments/Updates
- Table 116. Guangdong Fuxin Technology Competitive Strengths & Weaknesses
- Table 117. ARCTIC TEC Basic Information, Manufacturing Base and Competitors
- Table 118. ARCTIC TEC Major Business
- Table 119. ARCTIC TEC Semiconductor Peltier Module Product and Services
- Table 120. ARCTIC TEC Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. ARCTIC TEC Recent Developments/Updates
- Table 122. ARCTIC TEC Competitive Strengths & Weaknesses
- Table 123. KJLP Basic Information, Manufacturing Base and Competitors
- Table 124. KJLP Major Business
- Table 125. KJLP Semiconductor Peltier Module Product and Services
- Table 126. KJLP Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. KJLP Recent Developments/Updates
- Table 128. KJLP Competitive Strengths & Weaknesses
- Table 129. Thermion Company Basic Information, Manufacturing Base and Competitors
- Table 130. Thermion Company Major Business
- Table 131. Thermion Company Semiconductor Peltier Module Product and Services
- Table 132. Thermion Company Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Thermion Company Recent Developments/Updates
- Table 134. Thermion Company Competitive Strengths & Weaknesses
- Table 135. Z-MAX Basic Information, Manufacturing Base and Competitors

- Table 136. Z-MAX Major Business
- Table 137. Z-MAX Semiconductor Peltier Module Product and Services
- Table 138. Z-MAX Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Z-MAX Recent Developments/Updates
- Table 140. Z-MAX Competitive Strengths & Weaknesses
- Table 141. Zhejiang Wangu Semiconductor Basic Information, Manufacturing Base and Competitors
- Table 142. Zhejiang Wangu Semiconductor Major Business
- Table 143. Zhejiang Wangu Semiconductor Semiconductor Peltier Module Product and Services
- Table 144. Zhejiang Wangu Semiconductor Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Zhejiang Wangu Semiconductor Recent Developments/Updates
- Table 146. Zhejiang Wangu Semiconductor Competitive Strengths & Weaknesses
- Table 147. Xianghe Oriental Electronic Basic Information, Manufacturing Base and Competitors
- Table 148. Xianghe Oriental Electronic Major Business
- Table 149. Xianghe Oriental Electronic Semiconductor Peltier Module Product and Services
- Table 150. Xianghe Oriental Electronic Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 151. Xianghe Oriental Electronic Recent Developments/Updates
- Table 152. Xianghe Oriental Electronic Competitive Strengths & Weaknesses
- Table 153. Thermonamic Electronics Basic Information, Manufacturing Base and Competitors
- Table 154. Thermonamic Electronics Major Business
- Table 155. Thermonamic Electronics Semiconductor Peltier Module Product and Services
- Table 156. Thermonamic Electronics Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 157. Thermonamic Electronics Recent Developments/Updates
- Table 158. Thermonamic Electronics Competitive Strengths & Weaknesses
- Table 159. TE Technology Basic Information, Manufacturing Base and Competitors
- Table 160. TE Technology Major Business
- Table 161. TE Technology Semiconductor Peltier Module Product and Services

Table 162. TE Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. TE Technology Recent Developments/Updates

Table 164. TE Technology Competitive Strengths & Weaknesses

Table 165. P&N Technology Basic Information, Manufacturing Base and Competitors

Table 166. P&N Technology Major Business

Table 167. P&N Technology Semiconductor Peltier Module Product and Services

Table 168. P&N Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. P&N Technology Recent Developments/Updates

Table 170. P&N Technology Competitive Strengths & Weaknesses

Table 171. AISIN Corporation Basic Information, Manufacturing Base and Competitors

Table 172. AISIN Corporation Major Business

Table 173. AISIN Corporation Semiconductor Peltier Module Product and Services

Table 174. AISIN Corporation Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. AISIN Corporation Recent Developments/Updates

Table 176. AISIN Corporation Competitive Strengths & Weaknesses

Table 177. Sensor Controls Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 178. Sensor Controls Co., Ltd. Major Business

Table 179. Sensor Controls Co., Ltd. Semiconductor Peltier Module Product and Services

Table 180. Sensor Controls Co., Ltd. Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Sensor Controls Co., Ltd. Recent Developments/Updates

Table 182. Sensor Controls Co., Ltd. Competitive Strengths & Weaknesses

Table 183. Wakefield Thermal Basic Information, Manufacturing Base and Competitors

Table 184. Wakefield Thermal Major Business

Table 185. Wakefield Thermal Semiconductor Peltier Module Product and Services

Table 186. Wakefield Thermal Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Wakefield Thermal Recent Developments/Updates

Table 188. Wakefield Thermal Competitive Strengths & Weaknesses

Table 189. Same Sky (formerly CUI Devices) Basic Information, Manufacturing Base and Competitors

Table 190. Same Sky (formerly CUI Devices) Major Business

Table 191. Same Sky (formerly CUI Devices) Semiconductor Peltier Module Product and Services

Table 192. Same Sky (formerly CUI Devices) Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Same Sky (formerly CUI Devices) Recent Developments/Updates

Table 194. Same Sky (formerly CUI Devices) Competitive Strengths & Weaknesses

Table 195. TEC Microsystems GmbH Basic Information, Manufacturing Base and Competitors

Table 196. TEC Microsystems GmbH Major Business

Table 197. TEC Microsystems GmbH Semiconductor Peltier Module Product and Services

Table 198. TEC Microsystems GmbH Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. TEC Microsystems GmbH Recent Developments/Updates

Table 200. TEC Microsystems GmbH Competitive Strengths & Weaknesses

Table 201. Peltron GmbH Basic Information, Manufacturing Base and Competitors

Table 202. Peltron GmbH Major Business

Table 203. Peltron GmbH Semiconductor Peltier Module Product and Services

Table 204. Peltron GmbH Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Peltron GmbH Recent Developments/Updates

Table 206. Peltron GmbH Competitive Strengths & Weaknesses

Table 207. Kryotherm Industries Basic Information, Manufacturing Base and Competitors

Table 208. Kryotherm Industries Major Business

Table 209. Kryotherm Industries Semiconductor Peltier Module Product and Services

Table 210. Kryotherm Industries Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Kryotherm Industries Recent Developments/Updates

Table 212. Kryotherm Industries Competitive Strengths & Weaknesses

Table 213. Crystal Ltd Basic Information, Manufacturing Base and Competitors

Table 214. Crystal Ltd Major Business

- Table 215. Crystal Ltd Semiconductor Peltier Module Product and Services
- Table 216. Crystal Ltd Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 217. Crystal Ltd Recent Developments/Updates
- Table 218. Crystal Ltd Competitive Strengths & Weaknesses
- Table 219. Liaoning Lengxin Technology Basic Information, Manufacturing Base and Competitors
- Table 220. Liaoning Lengxin Technology Major Business
- Table 221. Liaoning Lengxin Technology Semiconductor Peltier Module Product and Services
- Table 222. Liaoning Lengxin Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 223. Liaoning Lengxin Technology Recent Developments/Updates
- Table 224. Liaoning Lengxin Technology Competitive Strengths & Weaknesses
- Table 225. Thermoelectric new energy technology Basic Information, Manufacturing Base and Competitors
- Table 226. Thermoelectric new energy technology Major Business
- Table 227. Thermoelectric new energy technology Semiconductor Peltier Module Product and Services
- Table 228. Thermoelectric new energy technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 229. Thermoelectric new energy technology Recent Developments/Updates
- Table 230. Thermoelectric new energy technology Competitive Strengths & Weaknesses
- Table 231. Jianju Technology Basic Information, Manufacturing Base and Competitors
- Table 232. Jianju Technology Major Business
- Table 233. Jianju Technology Semiconductor Peltier Module Product and Services
- Table 234. Jianju Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 235. Jianju Technology Recent Developments/Updates
- Table 236. Jianju Technology Competitive Strengths & Weaknesses
- Table 237. Bi Sheng Semiconductor Basic Information, Manufacturing Base and Competitors
- Table 238. Bi Sheng Semiconductor Major Business
- Table 239. Bi Sheng Semiconductor Semiconductor Peltier Module Product and

## Services

Table 240. Bi Sheng Semiconductor Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 241. Bi Sheng Semiconductor Recent Developments/Updates

Table 242. Bi Sheng Semiconductor Competitive Strengths & Weaknesses

Table 243. Henan Hongchang Electronic Basic Information, Manufacturing Base and Competitors

Table 244. Henan Hongchang Electronic Major Business

Table 245. Henan Hongchang Electronic Semiconductor Peltier Module Product and Services

Table 246. Henan Hongchang Electronic Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 247. Henan Hongchang Electronic Recent Developments/Updates

Table 248. Henan Hongchang Electronic Competitive Strengths & Weaknesses

Table 249. Wei County Zhongtian Electron Stock Cooperative Basic Information, Manufacturing Base and Competitors

Table 250. Wei County Zhongtian Electron Stock Cooperative Major Business

Table 251. Wei County Zhongtian Electron Stock Cooperative Semiconductor Peltier Module Product and Services

Table 252. Wei County Zhongtian Electron Stock Cooperative Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 253. Wei County Zhongtian Electron Stock Cooperative Recent Developments/Updates

Table 254. Wei County Zhongtian Electron Stock Cooperative Competitive Strengths & Weaknesses

Table 255. Beijing Xinyu Kaimeng Electronic Technology Basic Information, Manufacturing Base and Competitors

Table 256. Beijing Xinyu Kaimeng Electronic Technology Major Business

Table 257. Beijing Xinyu Kaimeng Electronic Technology Semiconductor Peltier Module Product and Services

Table 258. Beijing Xinyu Kaimeng Electronic Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 259. Beijing Xinyu Kaimeng Electronic Technology Recent Developments/Updates

Table 260. Beijing Xinyu Kaimeng Electronic Technology Competitive Strengths &

## Weaknesses

Table 261. Beijing Huimao Refrigeration Equipment Basic Information, Manufacturing Base and Competitors

Table 262. Beijing Huimao Refrigeration Equipment Major Business

Table 263. Beijing Huimao Refrigeration Equipment Semiconductor Peltier Module Product and Services

Table 264. Beijing Huimao Refrigeration Equipment Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 265. Beijing Huimao Refrigeration Equipment Recent Developments/Updates

Table 266. Beijing Huimao Refrigeration Equipment Competitive Strengths & Weaknesses

Table 267. Hangzhou Aurin Cooling Device Basic Information, Manufacturing Base and Competitors

Table 268. Hangzhou Aurin Cooling Device Major Business

Table 269. Hangzhou Aurin Cooling Device Semiconductor Peltier Module Product and Services

Table 270. Hangzhou Aurin Cooling Device Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 271. Hangzhou Aurin Cooling Device Recent Developments/Updates

Table 272. Hangzhou Aurin Cooling Device Competitive Strengths & Weaknesses

Table 273. Henan Guanjing Semiconductor Technology Basic Information, Manufacturing Base and Competitors

Table 274. Henan Guanjing Semiconductor Technology Major Business

Table 275. Henan Guanjing Semiconductor Technology Semiconductor Peltier Module Product and Services

Table 276. Henan Guanjing Semiconductor Technology Semiconductor Peltier Module Production (K Pcs), Price (US\$/Pcs), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 277. Henan Guanjing Semiconductor Technology Recent Developments/Updates

Table 278. Henan Guanjing Semiconductor Technology Competitive Strengths & Weaknesses

Table 279. Hubei Sagreon New Energy Technology Basic Information, Manufacturing Base and Competitors

Table 280. Hubei Sagreon New Energy Technology Major Business

Table 281. Hubei Sagreon New Energy Technology Semiconductor Peltier Module Product and Services

Table 282. Hubei Sagreon New Energy Technology Semiconductor Peltier Module

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

Table 283. Hubei Sagreon New Energy Technology Recent Developments/Updates

Table 284. Hubei Sagreon New Energy Technology Competitive Strengths & Weaknesses

Table 285. Global Key Players of Semiconductor Peltier Module Upstream (Raw Materials)

Table 286. Global Semiconductor Peltier Module Typical Customers

Table 287. Semiconductor Peltier Module Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Semiconductor Peltier Module Picture

Figure 2. World Semiconductor Peltier Module Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Semiconductor Peltier Module Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Semiconductor Peltier Module Production (2021-2032) & (K Pcs)

Figure 5. World Semiconductor Peltier Module Average Price (2021-2032) & (US\$/Pcs)

Figure 6. World Semiconductor Peltier Module Production Value Market Share by Region (2021-2032)

Figure 7. World Semiconductor Peltier Module Production Market Share by Region (2021-2032)

Figure 8. North America Semiconductor Peltier Module Production (2021-2032) & (K Pcs)

Figure 9. Europe Semiconductor Peltier Module Production (2021-2032) & (K Pcs)

Figure 10. China Semiconductor Peltier Module Production (2021-2032) & (K Pcs)

Figure 11. Japan Semiconductor Peltier Module Production (2021-2032) & (K Pcs)

Figure 12. Semiconductor Peltier Module Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 15. World Semiconductor Peltier Module Consumption Market Share by Region (2021-2032)

Figure 16. United States Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 17. China Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 18. Europe Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 19. Japan Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 20. South Korea Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 21. ASEAN Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 22. India Semiconductor Peltier Module Consumption (2021-2032) & (K Pcs)

Figure 23. Producer Shipments of Semiconductor Peltier Module by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Semiconductor Peltier Module Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Semiconductor Peltier

## Module Markets in 2025

Figure 26. United States VS China: Semiconductor Peltier Module Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Semiconductor Peltier Module Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Semiconductor Peltier Module Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Semiconductor Peltier Module Production Market Share 2025

Figure 30. China Based Manufacturers Semiconductor Peltier Module Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Semiconductor Peltier Module Production Market Share 2025

Figure 32. World Semiconductor Peltier Module Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Semiconductor Peltier Module Production Value Market Share by Type in 2025

Figure 34. Single-stage Type

Figure 35. Multi-stage Type

Figure 36. World Semiconductor Peltier Module Production Market Share by Type (2021-2032)

Figure 37. World Semiconductor Peltier Module Production Value Market Share by Type (2021-2032)

Figure 38. World Semiconductor Peltier Module Average Price by Type (2021-2032) & (US\$/Pcs)

Figure 39. World Semiconductor Peltier Module Production Value by Package Geometry, (USD Million), 2021 & 2025 & 2032

Figure 40. World Semiconductor Peltier Module Production Value Market Share by Package Geometry in 2025

Figure 41. Standard Type

Figure 42. Center-hole Type

Figure 43. Custom-shaped

Figure 44. Other

Figure 45. World Semiconductor Peltier Module Production Market Share by Package Geometry (2021-2032)

Figure 46. World Semiconductor Peltier Module Production Value Market Share by Package Geometry (2021-2032)

Figure 47. World Semiconductor Peltier Module Average Price by Package Geometry (2021-2032) & (US\$/Pcs)

Figure 48. World Semiconductor Peltier Module Production Value by Cooling Capacity (Qcmax), (USD Million), 2021 & 2025 & 2032

Figure 49. World Semiconductor Peltier Module Production Value Market Share by Cooling Capacity (Qcmax) in 2025

Figure 50. 50W Below

Figure 51. 50-100W

Figure 52. 100W Above

Figure 53. World Semiconductor Peltier Module Production Market Share by Cooling Capacity (Qcmax) (2021-2032)

Figure 54. World Semiconductor Peltier Module Production Value Market Share by Cooling Capacity (Qcmax) (2021-2032)

Figure 55. World Semiconductor Peltier Module Average Price by Cooling Capacity (Qcmax) (2021-2032) & (US\$/Pcs)

Figure 56. World Semiconductor Peltier Module Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Semiconductor Peltier Module Production Value Market Share by Application in 2025

Figure 58. Consumer Electronics

Figure 59. Communication

Figure 60. Medical

Figure 61. Automotive

Figure 62. Industrial

Figure 63. Aerospace Defense

Figure 64. Others

Figure 65. World Semiconductor Peltier Module Production Market Share by Application (2021-2032)

Figure 66. World Semiconductor Peltier Module Production Value Market Share by Application (2021-2032)

Figure 67. World Semiconductor Peltier Module Average Price by Application (2021-2032) & (US\$/Pcs)

Figure 68. Semiconductor Peltier Module Industry Chain

Figure 69. Semiconductor Peltier Module Procurement Model

Figure 70. Semiconductor Peltier Module Sales Model

Figure 71. Semiconductor Peltier Module Sales Channels, Direct Sales, and Distribution

Figure 72. Methodology

Figure 73. Research Process and Data Source

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