

Global Thermal Management Integrated Modules (TMIM) for EVs Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Thermal Management Integrated Modules (TMIM) for EVs market size was valued at US\$ 1980 million in 2025 and is forecast to a readjusted size of US\$ 5642 million by 2032 with a CAGR of 12.7% during review period.

In 2025, global Thermal Management Integrated Modules (TMIM) for EVs production reached approximately 7026 K Units, with an average global market price of around 274 USD per Unit.

Thermal Management Integrated Modules (TMIMs) are advanced systems designed to efficiently manage the thermal needs of various components within a vehicle, particularly in electric and hybrid vehicles. These modules integrate multiple thermal management functions into a single, compact system, optimizing the vehicle's performance, safety, and energy efficiency.

The upstream raw materials for Thermal Management Integrated Modules (TMIM) for EVs mainly include valves (multi-way water valves, shut-off valves, electronic expansion valves, check valves), electronic water pumps, condensers, gas-liquid separators, flow channels, etc. These components are sourced from highly competitive industries, with no monopoly by individual manufacturers or suppliers. TMIM manufacturers do not rely on a single supplier for their main raw materials. Typical raw material suppliers include Sanhua, TKG, Dun'an Artificial Environment, HANON, Egelhof, FUJIKOKI CORPORATION, Ningbo Tuopu Group, etc. Downstream applications are primarily with BEV and PHEV OEMs, with typical downstream customers including Tesla, BYD, Li Auto, NIO, XPeng, Volkswagen, GM, GAC, Geely, Volvo, etc.

The single-line capacity of Thermal Management Integrated Modules (TMIM) for EVs varies greatly depending on the technology route, product integration level, and factory automation level. The industry gross profit margin is usually in the range of 15%-25%.

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

Currently, major global Thermal Management Integrated Modules (TMIM) for EVs manufacturers include Sanhua, Ningbo Tuopu Group, Yinlun, Valeo, Mahle GmbH, Hanon Systems, HYUNDAI WIA, Songz Automobile Air Conditioning, Changzhou Tenglong Auto Parts, Jiangsu Chaoli Electric Manufacture, etc. The top five manufacturers are projected to hold over 80% of the global market share by 2025. Despite this high market concentration, other international manufacturers such as Denso Corporation, Aisin, Xiezhong International Thermal Management System, Mande Electronics, Feilong Automotive Parts, United Automotive Electronic System, Shanghai

Highly, Yuxin Automotive Thermal Management Technologies, Tianjin Pengling Group, Hangzhou Lingdong Automotive Thermal Management Technology, Longquan Xiazhi Thermal Management System, Yapp Automotive Systems, PXI AUTO COMPONENTS, Shanghai Dachuang Automotive Technology, etc., are also accelerating their development of TMIM-related products, leading to even fiercer competition in the future. Currently, there is no clearly dominant solution for integrated thermal management in electric vehicles (EVs) among domestic and international manufacturers. The various solutions differ significantly. Leading international companies, leveraging their extensive experience in traditional gasoline vehicle thermal management systems, can easily enter the EV integrated thermal management system market. Domestic manufacturers, compared to their international counterparts, possess advantages in localized support and cost, and are expected to rapidly capture market share in the EV integrated thermal management system market.

Thermal Management Integrated Modules (TMIMs) are mainly divided into Refrigerant Integrated Modules, Coolant Integrated Modules, and Comprehensive Integrated Modules. The penetration rate of these modules is rapidly increasing. According to our data, in 2025, Comprehensive Integrated Modules will account for 35.34% of the total global thermal management integrated module market.

According to our data, the demand for Thermal Management Integrated Modules (TMIMs) will grow from 7.03 million units in 2025 to 21.13 million units in 2032. Regionally, Greater China is the largest market and will continue to maintain its leading position. Most automakers, including Tesla, BYD, Geely, NIO, and XPeng Motors, have already deployed Thermal Management Integrated Modules (TMIMs) in their existing EV models. Furthermore, we predict that demand for Thermal Management Integrated Modules (TMIMs) in Europe and the Americas will continue to grow steadily from 2026 to 2032.

In the future, integrated thermal management systems will not only be able to achieve collaborative operation between subsystems through a unified control system to improve thermal management efficiency, but also meet the diverse needs of electric vehicle products, including high integration, thermal hazard control, remote control, environmentally friendly working fluids, temperature control adapted to high-voltage fast charging, and intelligent applications. Although integration is the general trend, the specific integration methods, functional configurations, scalability, and most importantly, the balance between efficiency and cost of thermal management modules still need to be tested in practice.

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

Key Features:

Global Thermal Management Integrated Modules (TMIM) for EVs market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Thermal Management Integrated Modules (TMIM) for EVs market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Thermal Management Integrated Modules (TMIM) for EVs market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Thermal Management Integrated Modules (TMIM) for EVs market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

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

To assess the growth potential for Thermal Management Integrated Modules (TMIM) for EVs

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

To assess competitive factors affecting the marketplace

This report profiles key players in the global Thermal Management Integrated Modules (TMIM) for EVs market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sanhua, Ningbo Tuopu Group, Yinlun, Valeo, Mahle GmbH, Hanon Systems, HYUNDAI WIA, Songz Automobile Air Conditioning, Changzhou Tenglong Auto Parts, Jiangsu Chaoli Electric Manufacture, etc.

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

Market Segmentation

Thermal Management Integrated Modules (TMIM) for EVs market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Refrigerant Integrated Module

Coolant Integrated Module

Comprehensive Integrated Module

Market segment by Chiller Heat Exchange

5kw Below

5-10kw

10kw Above

Market segment by LCC Heat Exchange

10kw Below

10-15kw

15kw Above

Market segment by Application

BEV

PHEV

Major players covered

Sanhua

Ningbo Tuopu Group

Yinlun

Valeo

Mahle GmbH

Hanon Systems

HYUNDAI WIA

Songz Automobile Air Conditioning

Changzhou Tenglong Auto Parts

Jiangsu Chaoli Electric Manufacture

Denso Corporation

Aisin

Xiezhong International Thermal Management System

Mande Electronics

Feilong Automotive Parts

United Automotive Electronic System

Shanghai Highly

Yuxin Automotive Thermal Management Technologies

Tianjin Pengling Group

Hangzhou Lingdong Automotive Thermal Management Technology

Longquan Xiazhi Thermal Management System

Yapp Automotive Systems

PXI AUTO COMPONENTS

Shanghai Dachuang Automotive Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Thermal Management Integrated Modules (TMIM) for EVs product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Thermal Management Integrated Modules (TMIM) for EVs, with price, sales quantity, revenue, and global market share of Thermal Management Integrated Modules (TMIM) for EVs from 2021 to 2026.

Chapter 3, the Thermal Management Integrated Modules (TMIM) for EVs competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Thermal Management Integrated Modules (TMIM) for EVs breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Thermal Management Integrated Modules (TMIM) for EVs market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Thermal Management Integrated Modules (TMIM) for EVs.

Chapter 14 and 15, to describe Thermal Management Integrated Modules (TMIM) for EVs sales channel, distributors, customers, research findings and conclusion.

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