

Global Thermal Management Integrated Modules (TMIM) 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) market size was valued at US\$ 2338 million in 2025 and is forecast to a readjusted size of US\$ 5693 million by 2032 with a CAGR of 13.7% during review period.

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.

In 2024, global electric vehicle sales will reach 17 million, an increase of about 25% year-on-year, accounting for more than 20% of the global automobile market for the first time; in the first quarter of 2025, global electric vehicle sales will increase by 35% year-on-year. The Chinese market continues to lead, with electric vehicle sales exceeding 11 million in 2024, accounting for nearly half of domestic new car sales. Entering 2025, the growth momentum of the Chinese market remains strong. According to data released by the China Association of Automobile Manufacturers, in the first quarter of 2025, China's electric vehicle production and sales will reach 3.182 million and 3.075 million respectively, a significant increase of 50.4% and 47.1% year-on-year respectively, and the sales of new electric vehicles will account for 41.2% of the total sales of new vehicles. With the continuous improvement of the penetration rate of electric vehicles, the pace of electrification transformation of traditional car companies has also been accelerating. Some traditional car companies have cooperated with technology companies to jointly develop electric vehicle technology and improve the level of

product intelligence. The electrification transformation of traditional car companies will not only help improve their own competitiveness, but will also drive the entire automotive industry to develop in a more environmentally friendly and intelligent direction.

Compared with traditional fuel vehicles, the main difference of electric vehicles is that the fuel engine system is replaced by three electric components (battery, motor, and electronic control), and the corresponding engine cooling system is changed to power battery thermal management and motor electronic control cooling system. Although the original automobile air conditioning system is retained, the original energy source engine is lost, so its main components have also changed significantly. The electric vehicle thermal management system consists of three parts: cabin thermal management (heating and cooling), battery system thermal management (heating and cooling), and motor electronic control cooling system. In the early days, due to the limitations of the electric vehicle oil-to-electric architecture and the insufficient integration capabilities of component suppliers, the subsystems of electric vehicle thermal management generally adopted a decentralized architecture. The decentralized thermal management system has high costs due to redundant components and pipelines, and it is impossible to coordinate the thermal management of the entire vehicle in a unified manner, which has low efficiency, resulting in the waste heat of batteries and motors not being effectively utilized. From the perspective of system architecture, electric vehicle thermal management has developed from decentralized operation of each subsystem to integrated operation. The integrated thermal management system can recycle the waste heat of the three electrics to reduce energy consumption and improve the performance of the heat pump. Since the heat pump system has poor performance in low-temperature scenarios, if the waste heat of the battery and motor can be recycled, its performance can be improved without increasing energy consumption. Tesla is the pioneer of highly integrated thermal management systems, and has now evolved to the fourth generation of products. After Tesla integrated the module, companies including BYD, Huawei, and Ideal have launched their own thermal management integrated solutions.

Currently, the global Thermal Management Integrated Modules (TMIM) manufacturers mainly 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. In 2024, the top five global manufacturers will account for more than 80% of the market share. Despite the high market concentration, other 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 the layout of Thermal Management Integrated Modules (TMIM) related products, and industry competition will be more intense in the future.

Thermal Management Integrated Modules (TMIM) are mainly divided into three types: Refrigerant Integrated Module, Coolant Integrated Module and Comprehensive Integrated Module. The penetration rate of these modules is increasing rapidly. According to our data, in 2024, the global Comprehensive Integrated Module accounts for 46% of the total thermal management integrated modules.

From a regional perspective, Greater China is the largest market and will continue to lead. The demand for Thermal Management Integrated Modules (TMIM) in the Asia-Pacific region will increase from 5.23 million units in 2024 to 18.90 million units in 2031. Most mainland China automakers, such as BYD, Geely, NIO and Xiaopeng Motors, have deployed Thermal Management Integrated Modules (TMIM) in their existing electric vehicle models. In addition, we predict that the demand for Thermal Management Integrated Modules (TMIM) in Europe and America will continue to grow steadily from 2025 to 2031.

In the future, the integrated thermal management system must not only be able to achieve collaborative work among subsystems through a unified control system to improve thermal management efficiency, but also meet the diverse demands of electric vehicle products for high integration, thermal damage control, remote control, environmentally friendly working fluids, temperature control that adapts to high-voltage fast charging and intelligent applications, etc. Although integration is the general trend, the specific integration method, functional configuration, scalability of the thermal management module, and the most important balance between efficiency and cost, etc., still need to be tested in practice.

This report is a detailed and comprehensive analysis for global Thermal Management Integrated Modules (TMIM) 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) 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) 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) 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) 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)

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) 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) 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 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) product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Thermal Management Integrated Modules (TMIM) 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) 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) 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).

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

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