

Global Thermal Management Module Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Thermal Management Module market size is expected to reach \$ 3731 million by 2032, rising at a market growth of 10.9% CAGR during the forecast period (2026-2032).

A thermal management module (TMM) is a highly integrated, 'smart' sub-assembly designed to regulate the temperature of critical components within electric vehicles (EVs), high-performance computing, and industrial power electronics. In the automotive sector, these modules have evolved from simple radiators and pumps into centralized 'super-manifolds' that synchronize the cooling and heating needs of the battery pack, electric motors, power inverters, and the passenger cabin. By consolidating multiple valves, pumps, and sensors into a single, compact unit, TMMs significantly reduce system weight, minimize coolant pressure drops, and simplify the vehicle's assembly process. In 2026, the market is defined by 'software-defined cooling,' where AI-driven control units predict thermal loads based on driving behavior or computational intensity, ensuring that systems operate within the narrow temperature windows required for maximum efficiency and longevity. Whether preventing thermal runaway in a lithium-ion battery or managing the heat flux of a next-generation AI processor, the TMM is the essential 'circulatory system' of modern high-power technology.

In 2025, global thermal management module production reached approximately 1039.55 k units, with an average global market price of around US\$ 1694 per unit. And global thermal management module production capacity reached approximately 1500 k units. The average gross margin in this industry reached 22.69%.

The upstream supply chain for thermal management modules is a specialized tier involving advanced material science and high-precision fluid control components. The

production of these modules requires high-performance polymers for multi-way valves, marine-grade aluminum for heat exchangers, and high-purity dielectric fluids for immersion cooling applications. Additionally, the integration of 'smart' features relies on a steady supply of automotive-grade microcontrollers and thermal interface materials (TIMs) like graphene-doped pastes. Key upstream suppliers for these essential materials include Mitsubishi Materials (supplying insulating substrates and high-accuracy thermistor sensors), DuPont (providing Kapton[®] polyimide films and high-performance polymers for thermal resistance), and ArcelorMittal (delivering specialized aluminum and steel alloys for high-durability module housings). These suppliers are critical for ensuring the modules can withstand the corrosive environments and high-pressure cycles inherent in long-term industrial and automotive use.

The downstream segment focuses on the integration of these modules into the next generation of electrified and automated platforms. At this stage, value is added through complex system calibration and 'digital twin' simulations that optimize heat flow across an entire vehicle or data center rack. Major downstream customers and high-volume institutional buyers include Tesla (utilizing highly integrated octovalve-style TMMs across its vehicle lineup), NVIDIA (incorporating advanced liquid-cooling modules into its Blackwell and Vera Rubin AI data center architectures), and Ford Motor Company (deploying modular thermal systems across its expanding fleet of electric commercial vans and trucks). The downstream market is currently shifting toward 'modular thermal-as-a-service,' where customers prioritize integrated platforms that offer plug-and-play compatibility with 800V high-voltage architectures and rapid-charging infrastructure.

This report studies the global Thermal Management Module production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Thermal Management Module total production and demand, 2021-2032, (Units)
Global Thermal Management Module total production value, 2021-2032, (USD Million)
Global Thermal Management Module production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Thermal Management Module consumption by region & country, CAGR,

2021-2032 & (Units)

U.S. VS China: Thermal Management Module domestic production, consumption, key domestic manufacturers and share

Global Thermal Management Module production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Thermal Management Module production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Thermal Management Module production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Thermal Management 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 Denso Corporation, Valeo, MAHLE, Gentherm, Boyd Corporation, Heatex, Sanhua, Ningbo Tuopu Group, Yinlun, Hanon Systems, 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 Thermal Management Module market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Thermal Management Module Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Thermal Management Module Market, Segmentation by Type:

Refrigerant Module

Coolant Module

Integrate Module

Global Thermal Management Module Market, Segmentation by Thermal Control Medium:

Water-Glycol Mixture

Refrigerant-Based

Others

Global Thermal Management Module Market, Segmentation by Operating Voltage:

12V

400V

800V

Others

Global Thermal Management Module Market, Segmentation by Application:

Automotive

Data Center

Others

Companies Profiled:

Denso Corporation

Valeo

MAHLE

Gentherm

Boyd Corporation

Heatex

Sanhua

Ningbo Tuopu Group

Yinlun

Hanon Systems

HYUNDAI WIA

Songz Automobile Air Conditioning

Changzhou Tenglong Auto Parts

Jiangsu Chaoli Electric Manufacture

Aisin

Xiezhong International Thermal Management System

Mande Electronics

Feilong Automotive Parts

Key Questions Answered:

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

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