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Global Automotive Auxiliary Electric Water Pump Market Growth 2026-2032

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Abstracts

The global Automotive Auxiliary Electric Water Pump market size is predicted to grow from US$ 1350 million in 2025 to US$ 2291 million in 2032; it is expected to grow at a CAGR of 7.7% from 2026 to 2032.

Automotive Auxiliary Electric Water Pump refers to an electrically driven coolant circulation pump installed in auxiliary or secondary thermal-management circuits of passenger cars and commercial vehicles. The product typically integrates a centrifugal hydraulic section, electric motor, electronic control unit and sealed housing, and operates independently of engine speed to provide demand-based coolant flow. Modern products are predominantly based on brushless DC motor technology and may support PWM, LIN or CAN communication for variable-speed control, diagnostics and coordination with the vehicle thermal-management controller. The research object primarily covers pumps serving cabin heating, turbocharger and charge-air cooling, engine and transmission auxiliary cooling, battery thermal management, electric motor and inverter cooling, onboard charger and DC-DC converter cooling, and other localized coolant circuits. Key product parameters include operating voltage, electrical power, coolant flow, pressure head, efficiency, operating temperature, noise and vibration performance, communication capability and service life. Current automotive portfolios are concentrated in low-voltage architectures such as 12V and 24V, while product design increasingly emphasizes high efficiency, compactness, low NVH and intelligent control.

Key Findings

Global vehicle production reached 96.4 million units in 2025, with Asia-Pacific contributing more than 61% of output

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Global electric car sales exceeded 20 million units in 2025, representing approximately one-quarter of worldwide new-car sales

12V remains the principal low-voltage platform for passenger-car auxiliary electric coolant pump applications

Battery, electric motor and power-electronics cooling are becoming increasingly important auxiliary pump applications

Brushless motors and intelligent variable-flow control are becoming standard directions for higher-value automotive auxiliary electric water pumps

Market Trends

Automotive auxiliary electric water pumps are evolving from relatively simple circulation devices for heater, turbocharger and residual-heat circuits toward intelligent thermal-management actuators serving multiple vehicle subsystems. Electrification is accelerating this transition because batteries, electric traction motors, inverters, onboard chargers and DC-DC converters each operate within relatively narrow temperature windows and may require independent coolant loops under different vehicle operating conditions. Product development is therefore moving toward electronically commutated brushless motors, variable-speed operation, integrated diagnostics, LIN/PWM or other vehicle-network communication, lower NVH and longer operating life. Another important trend is the integration of pumps with valves, manifolds, reservoirs and heat exchangers into compact coolant modules, allowing OEMs to reduce hoses, interfaces, pressure losses and installation space. At the component level, manufacturers are also improving hydraulic efficiency, power density and electronics protection, while some next-generation pump designs adopt alternative motor architectures and compatibility with dielectric coolants. These changes are shifting competitive differentiation from basic flow capacity toward system efficiency, controllability, durability and integration capability.

Market Dynamics

Drivers

The principal structural driver is the growing complexity of vehicle thermal management. Global electric car sales exceeded 20 million units in 2025 and represented

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approximately 25% of new-car sales, materially expanding the vehicle base requiring battery and power-electronics temperature control. Unlike mechanically driven pumps whose output is linked to engine speed, auxiliary electric pumps can circulate coolant independently and adjust flow according to actual thermal demand, improving energy efficiency and enabling coolant circulation when the combustion engine is stopped. This capability is particularly relevant for hybrid vehicles, start-stop systems, battery preconditioning and post-shutdown turbocharger cooling. At the same time, increasing power density in batteries, electric motors, inverters and charging electronics is creating more separate temperature zones and coolant circuits within each vehicle. The result is not only higher penetration of electric coolant pumps but also the possibility of multiple pumps per vehicle, supporting demand growth through both increasing vehicle electrification and higher thermal-management component content per vehicle.

Restraints

Automotive auxiliary electric water pumps operate in a highly cost-sensitive supply chain while being required to meet stringent durability and functional-safety expectations. Compared with conventional mechanically driven or basic auxiliary pumps, electronically controlled products add a brushless motor, power electronics, sensors, communication circuits and software, increasing component complexity and validation requirements. Pumps must maintain stable hydraulic performance under continuous vibration, thermal cycling, contaminated coolant and wide ambient-temperature conditions while avoiding leakage and excessive noise. OEM platform programs also require extensive vehicle-specific qualification, and changes to coolant chemistry, electrical architecture or mounting conditions can require additional validation. Cost pressure is especially pronounced in mature 12V applications, where suppliers must improve efficiency and lifetime without materially increasing unit prices. In electrified vehicles, failure of a coolant pump can affect battery, inverter or motor temperature control, raising reliability requirements further. These factors favor established suppliers with strong motor, electronics, hydraulic-design and automotive-quality capabilities and increase the commercialization barriers faced by new entrants.

Opportunities

The largest emerging opportunities are associated with the expansion and segmentation of thermal-management circuits in electrified vehicles. Battery temperature conditioning, electric motor and inverter cooling, onboard charger and DC-DC converter cooling create applications in which coolant flow must be accurately adjusted according to vehicle load, charging conditions and ambient temperature. Fast charging further increases the importance of efficient battery thermal management,

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while heat-pump-equipped electric vehicles are driving more sophisticated interaction among coolant and refrigerant circuits. This creates opportunities not only for individual auxiliary pumps but also for pump-and-valve modules and integrated coolant-management assemblies. Commercial vehicles represent another attractive direction because 24V electrical architectures and higher thermal loads can support higher-performance pump products. Technology opportunities are also emerging around higher-efficiency motors, compact electronics, integrated diagnostics, quieter operation and coolant-compatible designs for new thermal-management media. Suppliers capable of offering scalable pump platforms across conventional, hybrid, battery-electric and fuel-cell vehicles can spread engineering investment across multiple applications while participating in the continuing increase in thermal-management content per vehicle.

Challenges

The main industry challenge is balancing increasing technical requirements with persistent automotive cost-down pressure. Auxiliary pumps must deliver high efficiency, low noise, long service life and reliable electronics while remaining compact enough to fit increasingly crowded thermal-management architectures. As vehicles adopt multiple cooling loops, pump control also becomes more dependent on software calibration and coordination with valves, heat exchangers and central thermal-management controllers, increasing system-level development complexity. Electrified platforms place particular emphasis on low NVH because electric powertrains lack engine noise that previously masked pump operation. At the same time, automakers are pursuing more integrated coolant modules, which can reduce the number of standalone components and shift competitive advantage from individual pump manufacturing toward subsystem engineering. Regional differences in electrical architectures, coolant specifications and OEM qualification standards add further complexity. Suppliers therefore need to maintain competitive manufacturing costs while continuously investing in BLDC motors, electronic controls, hydraulic simulation, software, testing and global production capacity, creating significant pressure on smaller manufacturers and suppliers dependent on a limited number of vehicle programs.

Industry Chain Analysis

The automotive auxiliary electric water pump industry chain begins with engineering plastics and aluminum materials for housings and hydraulic components, permanent magnets, copper wire and electrical steel for motors, semiconductor and PCB components for electronic controllers, bearings or wet-rotor structures, seals, impellers, connectors and other precision components. Midstream manufacturers integrate motor

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design, centrifugal-pump hydraulics, electronics, software, sealing and thermal-management engineering into complete pump assemblies. Core production capabilities include injection molding or die casting, motor winding and assembly, electronic-controller manufacturing, impeller and housing processing, sealing, balancing, functional calibration and end-of-line flow, pressure, electrical and leakage testing. Downstream customers include vehicle manufacturers, Tier 1 thermal-management system suppliers and powertrain or electric-drive system suppliers. Value creation is gradually moving from mechanical manufacturing toward integrated electromechanical engineering: mature products are sensitive to scale and procurement costs, while higher-value products depend increasingly on BLDC motor efficiency, hydraulic optimization, electronics reliability, communications, diagnostic software, NVH control and application-specific engineering. Suppliers capable of integrating pumps into broader coolant modules can capture additional system-level value as thermal architectures become more complex.

Segment Insights

From a product-platform perspective, 12V auxiliary electric water pumps remain the most widely applicable configuration in passenger vehicles and cover applications ranging from heater and turbocharger circulation to battery, electric-motor and power-electronics cooling. Current supplier portfolios show that 12V products span compact low-flow pumps through medium-performance pumps capable of supporting complete auxiliary thermal circuits. The 24V segment is more closely associated with commercial vehicles and higher-power thermal-management requirements, where greater electrical power can support increased coolant flow and pressure. Electrification is also changing segmentation by function: traditional engine-related auxiliary circulation remains an important installed base, while battery, e-motor, inverter and charging-electronics cooling are becoming the more technically demanding growth applications. The latter typically place greater emphasis on continuous operation, efficiency, diagnostics and low noise. As thermal systems become more integrated, segmentation based solely on voltage or pump power becomes less sufficient; hydraulic performance, communication capability, service life and compatibility with integrated coolant modules are increasingly important determinants of product positioning and value.

Downstream Market Opportunities

Passenger cars form the core downstream demand base, but the most significant incremental opportunities are linked to hybrid and battery-electric powertrains. Conventional internal-combustion vehicles use auxiliary electric pumps for functions

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such as heater circulation, turbocharger cooling and residual-heat management, while hybrid vehicles combine these applications with additional cooling demand from power electronics and electrified propulsion components. Battery-electric vehicles further broaden the addressable system because batteries, traction motors, inverters, onboard chargers and DC-DC converters require coordinated thermal control, and individual vehicle architectures may employ multiple coolant pumps. Electric commercial vehicles, buses and trucks represent an additional opportunity because their larger batteries, higher thermal loads and longer operating cycles can require higher-capacity and more durable pump solutions. The downstream opportunity is therefore shifting from dependence on vehicle production alone toward a combination of electrified-vehicle penetration, number of independent thermal circuits per vehicle and the technical value of each pump.

Regional Insights

Asia-Pacific represents the most important regional foundation for automotive auxiliary electric water pump demand, reflecting its concentration of vehicle manufacturing and rapid electrification. OICA data indicate that Asia-Pacific accounted for more than 61% of global vehicle production in 2025, while China alone represented approximately 36% of worldwide output and produced a rapidly increasing volume of new-energy vehicles. This creates a large addressable base for both conventional auxiliary pumps and newer battery, electric-drive and power-electronics cooling applications. Europe has a smaller vehicle-production base but a comparatively high electrified-powertrain mix: battery-electric vehicles represented 17.4% of EU new-car registrations in 2025, while hybrid-electric vehicles accounted for 34.5%, supporting demand for increasingly sophisticated thermal-management systems. North America remains important because of its large passenger-car and light-truck market, established Tier 1 supplier network and growing localization of electrified-vehicle production. Emerging Asian and other regional production hubs provide additional opportunities as OEM supply chains diversify and thermal-management suppliers follow vehicle manufacturing into new locations.

Competitive Landscape Analysis

The global automotive auxiliary electric water pump market features competition among diversified automotive component groups, thermal-management specialists and focused pump or motor manufacturers. Established international suppliers such as Bosch, Rheinmetall, Schaeffler, AISIN, Hanon Systems, Valeo, Gates, MAHLE and DENSO compete through long-standing OEM relationships, global production networks and broader thermal-management or powertrain engineering capabilities. Chinese suppliers

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including Sanhua Automotive, Southeast Electric, VISU Autotec, Shenpeng, Feilong Auto Components, Jiangsu Leili, Yinlun, Shenglong and Fulin Precision participate through localized engineering, manufacturing cost competitiveness and growing exposure to domestic electrified-vehicle platforms, while FinDreams benefits from close integration with a major vehicle manufacturing ecosystem. Competition is moving beyond pump hardware toward motor efficiency, electronic controls, hydraulic design, NVH, diagnostics and system integration. Large multinational suppliers increasingly position pumps as part of complete thermal-management portfolios, while specialized manufacturers can compete through faster customization and cost-efficient platform development. No single competitive factor determines leadership across all applications because conventional auxiliary circuits, EV battery cooling, commercial vehicles and integrated thermal modules require different performance, cost and customer-integration capabilities.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Automotive Auxiliary Electric Water Pump Industry Forecast” looks at past sales and reviews total world Automotive Auxiliary Electric Water Pump sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive Auxiliary Electric Water Pump sales for 2026 through 2032. With Automotive Auxiliary Electric Water Pump sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive Auxiliary Electric Water Pump industry.

This Insight Report provides a comprehensive analysis of the global Automotive Auxiliary Electric Water Pump landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive Auxiliary Electric Water Pump portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Automotive Auxiliary Electric Water Pump market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Auxiliary Electric Water Pump and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive Auxiliary

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Electric Water Pump.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive Auxiliary Electric Water Pump market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

12V Electric Water Pump

24V Electric Water Pump

Other

Segmentation by Power:

Low-power

Medium-power

High-power

Segmentation by Function:

Battery Cooling

Electric Motor and Power Electronics Cooling

Turbocharger and Boosted Air Cooling

Engine and Aftertreatment Auxiliary Cooling

Other

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Segmentation by Application:

Passenger Car

Commercial Vehicle

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

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UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Bosch

Rheinmetall Automotive

Schaeffler

Sanhua Automotive

FinDreams

Southeast Electric Appliance & Motor

Aisin

Hanon Systems

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Valeo

VISU AUTOTEC

Gates

GMB

Shenpeng Technology

MAHLE

Feilong Auto Components

Jiangsu Leili Motor

Zhejiang Yinlun Machinery

DENSO

Ningbo Shenglong

Fulin Precision

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive Auxiliary Electric Water Pump market?

What factors are driving Automotive Auxiliary Electric Water Pump market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive Auxiliary Electric Water Pump market opportunities vary by end market size?

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How does Automotive Auxiliary Electric Water Pump break out by Type, by Application?

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