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Global Battery Pack Liquid Cooling Plate Market Growth 2026-2032

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Abstracts

The global Battery Pack Liquid Cooling Plate market size is predicted to grow from US$ 1909 million in 2025 to US$ 5213 million in 2032; it is expected to grow at a CAGR of 15.6% from 2026 to 2032.

Battery Pack Liquid Cooling Plate is a liquid-to-solid heat exchange component designed for thermal management of battery cells and modules in electric vehicles and stationary energy storage systems. The product transfers heat generated by battery cells through a thermally conductive plate containing internal coolant channels, enabling circulating coolant to maintain the battery within an appropriate operating temperature range during charging, discharging and high-load operation. Depending on system design, Battery Pack Liquid Cooling Plate can provide cooling at either module level or individual-cell level, with bottom-mounted, inter-cell, side-contact and conformal arrangements used to accommodate different battery formats. Key performance parameters include cooling capacity, cell temperature uniformity, coolant pressure drop, plate flatness, leak tightness, corrosion resistance, electrical insulation, mechanical durability, weight and packaging efficiency. Commercial manufacturing routes include Harmonica Tube Type, Stamping Type, Inflation Type and other structures such as extruded, laser-welded and hybrid cold plates. This study covers Battery Pack Liquid Cooling Plate products for Prismatic Battery, Cylindrical Battery and Pouch Battery applications, primarily serving BEV, PHEV, Energy Storage Systems and other battery-powered equipment.

Key Findings

Global Battery Pack Liquid Cooling Plate sales volume reached 23,791.9 K Sets in 2025

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The global average Battery Pack Liquid Cooling Plate selling price was approximately US$82 per set in 2025

MAHLE Sanhua Automotive Yinlun Nabaichuan Holding and Valeo were the top five manufacturers in 2025

The top five manufacturers accounted for 51.17% of global Battery Pack Liquid Cooling Plate revenue in 2025

Module Liquid Cooling Plate remains mainstream while Cell Liquid Cooling Plate is gaining importance for high-performance battery designs

Market Trends

Battery Pack Liquid Cooling Plate development is moving toward larger cooling areas, thinner structures, reduced coolant pressure loss and more precise thermal uniformity. Traditional products mainly cool modules from the bottom surface, but increasing battery integration and higher charging power are encouraging closer thermal contact with cells and more sophisticated coolant-channel layouts. Cell Liquid Cooling Plate solutions are becoming particularly relevant where conventional module-level cooling cannot provide sufficient contact area or temperature uniformity. Dana’s inter-cell design uses a 1 mm liquid-cooled plate placed between prismatic cells, while BorgWarner has developed extruded aluminum cooling profiles positioned between rows of cylindrical cells, illustrating the movement toward direct cell-level thermal management. At the same time, large Module Liquid Cooling Plate products are becoming wider and more integrated; Sanhua specifies cooling plates up to 1.6 meters wide and 2.5 meters long, while Valeo offers large liquid battery coolers designed to maximize contact with cells or modules. Manufacturing technology is also diversifying from conventional stamping and brazing toward extruded laser-welded, hybrid metal-plastic and other lower-material or lower-energy processes.

Market Dynamics

Drivers

The principal driver for the Battery Pack Liquid Cooling Plate market is the continued increase in electric vehicle and battery deployment, combined with growing thermal loads from higher battery capacities and faster charging. Global electric car sales exceeded 20 million units in 2025, while EV battery deployment reached approximately

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1.2 TWh, nearly 30% higher than in 2024. Higher charging and discharging rates increase localized heat generation and make cell-to-cell temperature consistency increasingly important for power capability, battery durability and safe operation. Battery manufacturers and vehicle OEMs therefore require cooling structures that remove heat efficiently while maintaining relatively uniform cell temperatures. Higher energy density also increases the importance of compact thermal management because space occupied by cooling components competes directly with available battery volume. These requirements support both large-area Module Liquid Cooling Plate and Cell Liquid Cooling Plate solutions, particularly in BEVs and high-power battery platforms.

Restraints

Battery Pack Liquid Cooling Plate manufacturers operate under persistent cost pressure while simultaneously facing increasingly strict performance and reliability requirements. Most automotive cooling plates are customized around battery dimensions, cell layout, coolant routing and connection interfaces, limiting standardization and increasing tooling and engineering expenditure. Large and thin aluminum structures must maintain flatness and mechanical stability while meeting stringent leak-tightness requirements over long sealing paths. Material and processing costs also remain important because production can involve aluminum sheet or extrusion, stamping, forming, brazing, laser welding, surface treatment, cleaning and 100% leak testing. More complex flow paths can improve thermal uniformity but may increase pressure loss and manufacturing difficulty. In addition, alternative thermal-management technologies such as direct refrigerant cooling and dielectric immersion cooling are under development for selected high-performance platforms, creating a longer-term technology substitution risk even though liquid cooling plates remain widely applicable across mainstream battery systems.

Opportunities

Major Battery Pack Liquid Cooling Plate opportunities are emerging from fast-charging BEVs, large cylindrical cells, higher-capacity battery packs, commercial electric vehicles and liquid-cooled Energy Storage Systems. High charging power increases the value of enhanced thermal contact and creates stronger demand for Cell Liquid Cooling Plate configurations positioned between or around individual cells. Cylindrical batteries are especially suitable for serpentine and conformal cooling structures because the cooling element can follow the curved cell surface and increase effective contact area. Large-format Module Liquid Cooling Plate remains attractive for prismatic battery packs because broad cooling surfaces can simplify coolant distribution and reduce the number of external connections. The increasing integration of battery cells, pack housings and

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structural components also creates opportunities for suppliers capable of combining cooling plates, manifolds, insulation and structural features into integrated assemblies. Regional expansion of EV and battery manufacturing outside China creates an additional opportunity for suppliers capable of establishing localized engineering and mass-production capacity near customers.

Challenges

The principal technical challenge is balancing heat-transfer capability, temperature uniformity, pressure drop, structural strength, thickness, weight and manufacturing cost within a limited battery-pack envelope. Increasing coolant velocity or channel complexity can improve local heat transfer but also raises pumping requirements and flow resistance, while reducing plate thickness saves weight but makes deformation and pressure resistance more difficult to control. Cell Liquid Cooling Plate introduces additional requirements because plates located directly between cells must maintain electrical insulation, dimensional consistency and mechanical compatibility with cell expansion throughout the battery life cycle. Dana’s inter-cell solution, for example, integrates dielectric isolation, reflecting the importance of electrical protection in cell-level cooling. Large Module Liquid Cooling Plate products face a different challenge: maintaining flatness and leak integrity across very large surfaces. Commercially, dedicated tooling and vehicle-specific designs expose suppliers to customer production schedules and model cycles, while rapid changes in cell dimensions and battery architecture can reduce reuse of existing products and production assets.

Industry Chain Analysis

The upstream Battery Pack Liquid Cooling Plate industry mainly consists of aluminum brazing sheet, aluminum extrusion and multi-port harmonica tubes, stamped sheet, brazing materials, plastic or composite components, manifolds, connectors, seals, thermal interface materials, dielectric layers and corrosion-resistant surface treatments. Midstream production involves thermal-fluid simulation, flow-channel development, stamping or extrusion, forming, brazing, laser welding or other joining processes, cleaning, surface treatment, assembly and leak testing. Manufacturing technology has a direct impact on weight, mechanical properties, capital intensity and production yield. Stamped aluminum designs provide strong suitability for high-volume large-area cooling plates, while extrusion supports stable multi-channel and inter-cell profiles; laser-welded and metal-plastic hybrid designs provide additional alternatives for weight and process optimization. Downstream demand mainly comes from battery manufacturers, battery pack integrators, BEV and PHEV manufacturers, commercial vehicle manufacturers and

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Energy Storage Systems suppliers. Value creation is increasingly concentrated in thermal simulation, coolant distribution optimization, low-pressure-drop design, joining reliability, production consistency and early-stage customer co-development rather than basic aluminum processing alone.

Segment Insights

By Type, Stamping Type is a major commercial technology because stamped aluminum structures can create large-area internal coolant paths while supporting automated high-volume production. The process is particularly applicable to flat Module Liquid Cooling Plate products used beneath prismatic or pouch battery modules. Harmonica Tube Type uses extruded multi-port channels and offers relatively stable flow geometry, good pressure resistance and modular manufacturing characteristics, making it suitable for selected module-level and cell-level applications. Inflation Type forms internal cooling passages between bonded metal sheets and offers advantages in material utilization and channel-layout flexibility. Others include extruded cooling plates, serpentine profiles, laser-welded plates and metal-plastic hybrid structures; these alternatives are gaining relevance as manufacturers seek lower weight, fewer manufacturing steps and improved structural integration.

By Cooling Range, Module Liquid Cooling Plate represents the established mainstream configuration because it can cool multiple cells through a common module contact surface and provides favorable manufacturing efficiency for large battery packs. Cell Liquid Cooling Plate places cooling surfaces directly between or around cells, offering greater effective heat-transfer area and potentially better local temperature control. This configuration is becoming increasingly relevant for high-rate charging, large cylindrical cells and battery systems with demanding temperature-uniformity requirements. By Battery Type, Prismatic Battery systems primarily use large bottom or side cooling plates and can also adopt inter-cell plates; Cylindrical Battery systems create stronger demand for serpentine, corrugated and conformal structures; Pouch Battery systems generally require thin, flat cooling surfaces capable of providing uniform thermal and mechanical contact.

Downstream Market Opportunities

BEV represents the largest structural opportunity for Battery Pack Liquid Cooling Plate because BEVs typically combine relatively large battery capacity with sustained propulsion loads and increasingly high charging power. In 2025, battery electric vehicles accounted for approximately 65% of global electric car sales, reinforcing the importance

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of high-capacity traction battery thermal management. As BEV platforms seek faster charging and higher battery packaging efficiency, customers increasingly require thinner cooling plates, improved cell temperature uniformity and reduced coolant-system complexity. PHEVs represent a smaller but technically important application because their battery packs experience frequent charging and relatively high power demand relative to battery capacity. Module Liquid Cooling Plate is suitable for conventional battery module architectures, while Cell Liquid Cooling Plate provides additional performance potential for battery formats requiring closer direct thermal contact.

Energy Storage Systems provide an additional long-term market opportunity. Stationary batteries operate through repeated charge-discharge cycles and require thermal consistency to maintain battery performance and reliability across large numbers of cells. Compared with automotive applications, ESS generally places relatively greater emphasis on lifecycle cost, modularity, maintenance and system-level temperature consistency, creating opportunities for cost-optimized large-area Module Liquid Cooling Plate products. Other downstream markets include electric trucks, buses, off-highway machinery, specialty vehicles and other high-capacity battery platforms. Electric trucks are particularly relevant because global battery deployment for electric trucks more than doubled in 2025, indicating rising thermal-management requirements in high-duty-cycle commercial applications.

Regional Insights

China is the largest underlying demand and manufacturing base for Battery Pack Liquid Cooling Plate, supported by the scale of its EV and lithium-ion battery industries. China accounted for around 60% of global EV battery deployment in 2025 and more than 80% of global battery cell production, while approximately six out of ten electric cars sold globally were sold in China. This concentration supports a dense supply chain for aluminum processing, battery pack manufacturing and thermal-management components and favors rapid engineering collaboration between cooling plate producers, battery manufacturers and vehicle OEMs. Europe represents another major market, supported by strong EV adoption and regional vehicle production; electric car sales in Europe exceeded 4 million in 2025 and increased by around 30% year on year. These market conditions support demand for high-performance and structurally integrated Battery Pack Liquid Cooling Plate products.

North America remains an important market for large battery packs, cylindrical-cell platforms and commercial vehicle electrification, although recent EV demand has been more sensitive to policy changes than in China and Europe. Outside the three major EV

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markets, Southeast Asia and Latin America are becoming increasingly relevant downstream regions. Electric car sales in Southeast Asia more than doubled in 2025, while Latin American sales increased by approximately 75%, supporting gradual localization of battery pack and thermal-management supply chains. In the early stages of market development, these emerging regions are likely to rely significantly on production facilities operated by global and Asian suppliers; as regional battery and vehicle assembly volumes rise, localized Battery Pack Liquid Cooling Plate manufacturing becomes increasingly economically viable.

Competitive Landscape Analysis

The global Battery Pack Liquid Cooling Plate market has a moderately concentrated competitive structure. According to this study, MAHLE, Sanhua Automotive, Yinlun, Nabaichuan Holding and Valeo were the five leading manufacturers in 2025 and together accounted for 51.17% of global market revenue. Competition among leading suppliers increasingly extends beyond metal forming into thermal-fluid simulation, coolant-channel optimization, lightweighting, joining technology, electrical insulation, surface treatment and automotive-scale quality control. Product development illustrates this shift: MAHLE’s bionic channel design delivers 10% higher cooling capacity and up to 20% lower pressure loss than its reference design, while Sanhua offers battery cooling plates with widths up to 1.6 meters and lengths up to 2.5 meters, reflecting demand for increasingly large and technically optimized products. Valeo meanwhile offers distinct large-format and cylindrical-cell cooling structures, demonstrating the growing differentiation required across battery platforms.

Competition beyond the leading five remains active, with Dana, BorgWarner, Sogefi Group, Boyd Corporation and other specialized manufacturers pursuing different technology and customer strategies. Dana and BorgWarner have developed Cell Liquid Cooling Plate solutions for prismatic and cylindrical cells respectively, while Sogefi is developing extruded laser-welded and metal-plastic hybrid plates and Boyd combines multiple cold-plate manufacturing technologies with global manufacturing capability. The competitive basis is therefore shifting from unit price toward application engineering, product reliability, production yield, customer co-development and geographic manufacturing coverage. Suppliers able to support both Module Liquid Cooling Plate and Cell Liquid Cooling Plate, multiple battery formats and regionalized mass production are better positioned to address the increasing diversification of BEV, PHEV and ESS battery architectures.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Battery Pack Liquid Cooling Plate 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 Battery Pack Liquid Cooling Plate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Battery Pack Liquid Cooling Plate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Battery Pack Liquid Cooling Plate 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 Battery Pack Liquid Cooling Plate.

This report presents a comprehensive overview, market shares, and growth opportunities of Battery Pack Liquid Cooling Plate market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Harmonica Tube Type

Stamping Type

Inflation Type

Others

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Segmentation by Cooling Range:

Module Liquid Cooling Plate

Cell Liquid Cooling Plate

Segmentation by Battery Type:

Prismatic Battery

Cylindrical Battery

Pouch Battery

Segmentation by Application:

BEV (Battery Electric Vehicles)

PHEV (Plug-In Hybrid Electric Vehicles)

Energy Storage Systems (ESS)

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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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.

MAHLE

Sanhua Automotive

Yinlun

Nabaichuan Holding

Valeo

Dana

Hengchuang Thermal Management

XMAX New Energy

BorgWarner

Runthrough Heat Exchange

Sogefi Group

Boyd Corporation

Modine Manufacturing

Senior Flexonics

Cotran

Shenzhen FRD

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Nippon Light Metal

Trumony Aluminum

Hubei Reddit Cooling System

Guangxi Yide Technology

ONEGENE

Huanan Lineng technology

XD THERMAL

KOHSAN

Key Questions Addressed in this Report

What is the 10-year outlook for the global Battery Pack Liquid Cooling Plate market?

What factors are driving Battery Pack Liquid Cooling Plate market growth, globally and by region?

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

How do Battery Pack Liquid Cooling Plate market opportunities vary by end market size?

How does Battery Pack Liquid Cooling Plate break out by Type, by Application?

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