

Global EV Holistic Thermal Management Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global EV Holistic Thermal Management market size is predicted to grow from US\$ 29950 million in 2025 to US\$ 80620 million in 2032; it is expected to grow at a CAGR of 15.5% from 2026 to 2032.

EV Holistic Thermal Management is the integrated hardware and control system used in battery electric and plug-in hybrid vehicles to manage the temperature of all thermally critical components. It covers the traction battery pack, e-motor and e-axle, power electronics (inverter, on-board charger, DC/DC converter), on-board charging equipment and the cabin HVAC/heat-pump unit. Typical EV thermal management systems integrate coolant loops with cold plates or jackets, refrigerant circuits with chillers or direct-refrigerant battery cooling, heat pumps and PTC heaters, electric coolant pumps, multi-port electronic valves, electric A/C compressors, expansion tanks, hoses and pipes, sensors and a dedicated thermal management ECU or domain controller. By coordinating heating, cooling, pre-conditioning and waste-heat recovery across these subsystems under varying ambient conditions and duty cycles, the system enables battery pre-heating and cooling, fast-charging temperature control, e-powertrain and inverter cooling, and efficient cabin heating and cooling, thereby ensuring battery safety and durability while improving overall vehicle energy efficiency, driving range and occupant comfort.

The supply chain can broadly be divided into three tiers. Upstream players supply coolants and refrigerants, aluminum and copper sheets/extrusions, engineering plastics, rubber seals, fin materials for heat exchangers, as well as sensors, power semiconductors and control electronics. Midstream Tier-1 and Tier-2 suppliers deliver electric coolant pumps, electronically controlled valves, electric A/C compressors, cold plates and battery cooling modules, combined engine–e-drive cooling modules,

EGR/waste-heat recovery heat exchangers, heat-pump assemblies, integrated thermal management modules (ITM/ICM) and hose/pipe assemblies, and they often co-design system architecture and calibration with OEMs. Downstream, vehicle manufacturers and some battery/e-drive/engine integrators define the overall hybrid/EV thermal concept and source complete systems or major modules.

EV Holistic Thermal Management regulates the temperature of each area of the vehicle to ensure the normal operation of components and passenger comfort, and improve the energy efficiency of the EV. EV holistic thermal management system is a core vehicle-level system that ensures the traction battery, e-motor, inverter, on-board charger and cabin all operate within their optimal temperature ranges, directly influencing usable range, fast-charging capability, safety and comfort. As electric vehicles move from early adoption to mass-market penetration, the thermal system has shifted from a basic cooling loop into a highly engineered, multi-loop architecture that must deliver stable performance in hot summers, cold winters, high-speed driving, urban congestion and repeated DC fast-charging events. In practice, the EV thermal management system has become one of the key determinants of perceived product quality, especially in markets where customers compare real-world range, fast-charging speed and HVAC performance across brands.

From a technology development perspective, EV holistic thermal management systems are evolving from simple glycol-based cooling for batteries and power electronics toward integrated solutions that couple coolant and refrigerant loops, and increasingly rely on heat pump architectures. Typical modern systems include liquid-cooled battery packs with aluminum cold plates, dedicated liquid circuits for e-motor and inverter cooling, compact chiller units to transfer heat between refrigerant and coolant, and high-efficiency heat pumps using low-GWP refrigerants for cabin heating and cooling. Integrated valve blocks, variable-speed pumps and e-compressors, together with thermal domain controllers, enable the system to pre-condition the battery before fast charging, coordinate thermal demands from multiple subsystems, and select the most efficient operating mode in real time.

The EV holistic thermal management system field is rich in both opportunities and challenges. On the opportunity side, higher-voltage architectures (800 V and above), ultra-fast charging, high-energy-density battery chemistries and the growth of electric buses, trucks and vans all demand more precise and efficient thermal control, opening space for innovation in heat exchangers, coolants, system integration and software algorithms. As EVs penetrate harsher climates, brands that can maintain range, charging power and quiet, comfortable cabins in extreme conditions will gain a clear

competitive edge. On the challenge side, increasing functional demands must fit into tight packaging spaces and strict cost targets, while meeting low-GWP refrigerant regulations and high reliability expectations over long vehicle lifetimes. Managing consistent performance across different cell formats, pack designs and vehicle platforms adds further complexity and requires close cross-functional collaboration. Against this backdrop, the EV thermal management system is no longer a secondary engineering topic, but a strategic domain that links electrochemistry, thermal hardware, control software and user experience across the entire EV value chain.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for EV Holistic Thermal Management 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 EV Holistic Thermal Management.

This report presents a comprehensive overview, market shares, and growth opportunities of EV Holistic Thermal Management market by product type, application, key players and key regions and countries.

Segmentation by Type:

Powertrain System

Air Conditioning System

Segmentation by Sales Channel:

OEM

Aftermarket

Segmentation by Vehicle Use:

Passenger Cars

Commercial Vehicles

Segmentation by Application:

BEV

PHEV

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

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 analyzing the company's coverage, product portfolio, its market penetration.

DENSO

Hanon Systems

Valeo

MAHLE GmbH

Sanhua Intelligent Controls

Sanden

Aotecar

Yinlun Machinery

HASCO

Songz Automobile Air Conditioning

Tuopu Group

Zhongding Group

Feilong Auto Components

Tenglong Auto Parts

Senior Flexonics

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global EV Holistic Thermal Management Market Size (2021-2032)
 - 2.1.2 EV Holistic Thermal Management Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for EV Holistic Thermal Management by Country/Region (2021, 2025 & 2032)
- 2.2 EV Holistic Thermal Management Segment by Type
 - 2.2.1 Powertrain System
 - 2.2.2 Air Conditioning System
 - 2.2.3 EV Holistic Thermal Management Market Size by Type
 - 2.2.3.1 EV Holistic Thermal Management Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.3.2 Global EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)
- 2.3 EV Holistic Thermal Management Segment by Sales Channel
 - 2.3.1 OEM
 - 2.3.2 Aftermarket
 - 2.3.3 EV Holistic Thermal Management Market Size by Sales Channel
 - 2.3.3.1 EV Holistic Thermal Management Market Size CAGR by Sales Channel (2021 VS 2025 VS 2032)
 - 2.3.3.2 Global EV Holistic Thermal Management Market Size Market Share by Sales Channel (2021-2026)
- 2.4 EV Holistic Thermal Management Segment by Vehicle Use
 - 2.4.1 Passenger Cars

2.4.2 Commercial Vehicles

2.4.3 EV Holistic Thermal Management Market Size by Vehicle Use

2.4.3.1 EV Holistic Thermal Management Market Size CAGR by Vehicle Use (2021 VS 2025 VS 2032)

2.4.3.2 Global EV Holistic Thermal Management Market Size Market Share by Vehicle Use (2021-2026)

2.5 EV Holistic Thermal Management Segment by Application

2.5.1 BEV

2.5.2 PHEV

2.5.3 EV Holistic Thermal Management Market Size by Application

2.5.3.1 EV Holistic Thermal Management Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.3.2 Global EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

3 EV HOLISTIC THERMAL MANAGEMENT MARKET SIZE BY PLAYER

3.1 EV Holistic Thermal Management Market Size Market Share by Player

3.1.1 Global EV Holistic Thermal Management Revenue by Player (2021-2026)

3.1.2 Global EV Holistic Thermal Management Revenue Market Share by Player (2021-2026)

3.2 Global EV Holistic Thermal Management Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 EV HOLISTIC THERMAL MANAGEMENT BY REGION

4.1 EV Holistic Thermal Management Market Size by Region (2021-2026)

4.2 Global EV Holistic Thermal Management Annual Revenue by Country/Region (2021-2026)

4.3 Americas EV Holistic Thermal Management Market Size Growth (2021-2026)

4.4 APAC EV Holistic Thermal Management Market Size Growth (2021-2026)

4.5 Europe EV Holistic Thermal Management Market Size Growth (2021-2026)

4.6 Middle East & Africa EV Holistic Thermal Management Market Size Growth (2021-2026)

5 AMERICAS

- 5.1 Americas EV Holistic Thermal Management Market Size by Country (2021-2026)
- 5.2 Americas EV Holistic Thermal Management Market Size by Type (2021-2026)
- 5.3 Americas EV Holistic Thermal Management Market Size by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC EV Holistic Thermal Management Market Size by Region (2021-2026)
- 6.2 APAC EV Holistic Thermal Management Market Size by Type (2021-2026)
- 6.3 APAC EV Holistic Thermal Management Market Size by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia

7 EUROPE

- 7.1 Europe EV Holistic Thermal Management Market Size by Country (2021-2026)
- 7.2 Europe EV Holistic Thermal Management Market Size by Type (2021-2026)
- 7.3 Europe EV Holistic Thermal Management Market Size by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa EV Holistic Thermal Management by Region (2021-2026)
- 8.2 Middle East & Africa EV Holistic Thermal Management Market Size by Type

(2021-2026)

8.3 Middle East & Africa EV Holistic Thermal Management Market Size by Application

(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL EV HOLISTIC THERMAL MANAGEMENT MARKET FORECAST

10.1 Global EV Holistic Thermal Management Forecast by Region (2027-2032)

10.1.1 Global EV Holistic Thermal Management Forecast by Region (2027-2032)

10.1.2 Americas EV Holistic Thermal Management Forecast

10.1.3 APAC EV Holistic Thermal Management Forecast

10.1.4 Europe EV Holistic Thermal Management Forecast

10.1.5 Middle East & Africa EV Holistic Thermal Management Forecast

10.2 Americas EV Holistic Thermal Management Forecast by Country (2027-2032)

10.2.1 United States Market EV Holistic Thermal Management Forecast

10.2.2 Canada Market EV Holistic Thermal Management Forecast

10.2.3 Mexico Market EV Holistic Thermal Management Forecast

10.2.4 Brazil Market EV Holistic Thermal Management Forecast

10.3 APAC EV Holistic Thermal Management Forecast by Region (2027-2032)

10.3.1 China EV Holistic Thermal Management Market Forecast

10.3.2 Japan Market EV Holistic Thermal Management Forecast

10.3.3 Korea Market EV Holistic Thermal Management Forecast

10.3.4 Southeast Asia Market EV Holistic Thermal Management Forecast

10.3.5 India Market EV Holistic Thermal Management Forecast

10.3.6 Australia Market EV Holistic Thermal Management Forecast

10.4 Europe EV Holistic Thermal Management Forecast by Country (2027-2032)

10.4.1 Germany Market EV Holistic Thermal Management Forecast

10.4.2 France Market EV Holistic Thermal Management Forecast

10.4.3 UK Market EV Holistic Thermal Management Forecast

- 10.4.4 Italy Market EV Holistic Thermal Management Forecast
- 10.4.5 Russia Market EV Holistic Thermal Management Forecast
- 10.5 Middle East & Africa EV Holistic Thermal Management Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market EV Holistic Thermal Management Forecast
 - 10.5.2 South Africa Market EV Holistic Thermal Management Forecast
 - 10.5.3 Israel Market EV Holistic Thermal Management Forecast
 - 10.5.4 Turkey Market EV Holistic Thermal Management Forecast
- 10.6 Global EV Holistic Thermal Management Forecast by Type (2027-2032)
- 10.7 Global EV Holistic Thermal Management Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market EV Holistic Thermal Management Forecast

11 KEY PLAYERS ANALYSIS

- 11.1 DENSO
 - 11.1.1 DENSO Company Information
 - 11.1.2 DENSO EV Holistic Thermal Management Product Offered
 - 11.1.3 DENSO EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.1.4 DENSO Main Business Overview
 - 11.1.5 DENSO Latest Developments
- 11.2 Hanon Systems
 - 11.2.1 Hanon Systems Company Information
 - 11.2.2 Hanon Systems EV Holistic Thermal Management Product Offered
 - 11.2.3 Hanon Systems EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.2.4 Hanon Systems Main Business Overview
 - 11.2.5 Hanon Systems Latest Developments
- 11.3 Valeo
 - 11.3.1 Valeo Company Information
 - 11.3.2 Valeo EV Holistic Thermal Management Product Offered
 - 11.3.3 Valeo EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.3.4 Valeo Main Business Overview
 - 11.3.5 Valeo Latest Developments
- 11.4 MAHLE GmbH
 - 11.4.1 MAHLE GmbH Company Information
 - 11.4.2 MAHLE GmbH EV Holistic Thermal Management Product Offered
 - 11.4.3 MAHLE GmbH EV Holistic Thermal Management Revenue, Gross Margin and

Market Share (2021-2026)

11.4.4 MAHLE GmbH Main Business Overview

11.4.5 MAHLE GmbH Latest Developments

11.5 Sanhua Intelligent Controls

11.5.1 Sanhua Intelligent Controls Company Information

11.5.2 Sanhua Intelligent Controls EV Holistic Thermal Management Product Offered

11.5.3 Sanhua Intelligent Controls EV Holistic Thermal Management Revenue, Gross

Margin and Market Share (2021-2026)

11.5.4 Sanhua Intelligent Controls Main Business Overview

11.5.5 Sanhua Intelligent Controls Latest Developments

11.6 Sanden

11.6.1 Sanden Company Information

11.6.2 Sanden EV Holistic Thermal Management Product Offered

11.6.3 Sanden EV Holistic Thermal Management Revenue, Gross Margin and Market

Share (2021-2026)

11.6.4 Sanden Main Business Overview

11.6.5 Sanden Latest Developments

11.7 Aotecar

11.7.1 Aotecar Company Information

11.7.2 Aotecar EV Holistic Thermal Management Product Offered

11.7.3 Aotecar EV Holistic Thermal Management Revenue, Gross Margin and Market

Share (2021-2026)

11.7.4 Aotecar Main Business Overview

11.7.5 Aotecar Latest Developments

11.8 Yinlun Machinery

11.8.1 Yinlun Machinery Company Information

11.8.2 Yinlun Machinery EV Holistic Thermal Management Product Offered

11.8.3 Yinlun Machinery EV Holistic Thermal Management Revenue, Gross Margin

and Market Share (2021-2026)

11.8.4 Yinlun Machinery Main Business Overview

11.8.5 Yinlun Machinery Latest Developments

11.9 HASCO

11.9.1 HASCO Company Information

11.9.2 HASCO EV Holistic Thermal Management Product Offered

11.9.3 HASCO EV Holistic Thermal Management Revenue, Gross Margin and Market

Share (2021-2026)

11.9.4 HASCO Main Business Overview

11.9.5 HASCO Latest Developments

11.10 Songz Automobile Air Conditioning

- 11.10.1 Songz Automobile Air Conditioning Company Information
- 11.10.2 Songz Automobile Air Conditioning EV Holistic Thermal Management Product Offered
- 11.10.3 Songz Automobile Air Conditioning EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
- 11.10.4 Songz Automobile Air Conditioning Main Business Overview
- 11.10.5 Songz Automobile Air Conditioning Latest Developments
- 11.11 Tuopu Group
 - 11.11.1 Tuopu Group Company Information
 - 11.11.2 Tuopu Group EV Holistic Thermal Management Product Offered
 - 11.11.3 Tuopu Group EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.11.4 Tuopu Group Main Business Overview
 - 11.11.5 Tuopu Group Latest Developments
- 11.12 Zhongding Group
 - 11.12.1 Zhongding Group Company Information
 - 11.12.2 Zhongding Group EV Holistic Thermal Management Product Offered
 - 11.12.3 Zhongding Group EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 Zhongding Group Main Business Overview
 - 11.12.5 Zhongding Group Latest Developments
- 11.13 Feilong Auto Components
 - 11.13.1 Feilong Auto Components Company Information
 - 11.13.2 Feilong Auto Components EV Holistic Thermal Management Product Offered
 - 11.13.3 Feilong Auto Components EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 Feilong Auto Components Main Business Overview
 - 11.13.5 Feilong Auto Components Latest Developments
- 11.14 Tenglong Auto Parts
 - 11.14.1 Tenglong Auto Parts Company Information
 - 11.14.2 Tenglong Auto Parts EV Holistic Thermal Management Product Offered
 - 11.14.3 Tenglong Auto Parts EV Holistic Thermal Management Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 Tenglong Auto Parts Main Business Overview
 - 11.14.5 Tenglong Auto Parts Latest Developments
- 11.15 Senior Flexonics
 - 11.15.1 Senior Flexonics Company Information
 - 11.15.2 Senior Flexonics EV Holistic Thermal Management Product Offered
 - 11.15.3 Senior Flexonics EV Holistic Thermal Management Revenue, Gross Margin

and Market Share (2021-2026)

11.15.4 Senior Flexonics Main Business Overview

11.15.5 Senior Flexonics Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. EV Holistic Thermal Management Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. EV Holistic Thermal Management Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Powertrain System

Table 4. Major Players of Air Conditioning System

Table 5. EV Holistic Thermal Management Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 6. Global EV Holistic Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 7. Global EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)

Table 8. Major Players of OEM

Table 9. Major Players of Aftermarket

Table 10. EV Holistic Thermal Management Market Size CAGR by Sales Channel (2021 VS 2025 VS 2032) & (\$ millions)

Table 11. Global EV Holistic Thermal Management Market Size by Sales Channel (2021-2026) & (\$ millions)

Table 12. Global EV Holistic Thermal Management Market Size Market Share by Sales Channel (2021-2026)

Table 13. Major Players of Passenger Cars

Table 14. Major Players of Commercial Vehicles

Table 15. EV Holistic Thermal Management Market Size CAGR by Vehicle Use (2021 VS 2025 VS 2032) & (\$ millions)

Table 16. Global EV Holistic Thermal Management Market Size by Vehicle Use (2021-2026) & (\$ millions)

Table 17. Global EV Holistic Thermal Management Market Size Market Share by Vehicle Use (2021-2026)

Table 18. EV Holistic Thermal Management Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 19. Global EV Holistic Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 20. Global EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

Table 21. Global EV Holistic Thermal Management Revenue by Player (2021-2026) &

(\$ millions)

Table 22. Global EV Holistic Thermal Management Revenue Market Share by Player (2021-2026)

Table 23. EV Holistic Thermal Management Key Players Head office and Products Offered

Table 24. EV Holistic Thermal Management Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 25. New Products and Potential Entrants

Table 26. Mergers & Acquisitions, Expansion

Table 27. Global EV Holistic Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 28. Global EV Holistic Thermal Management Market Size Market Share by Region (2021-2026)

Table 29. Global EV Holistic Thermal Management Revenue by Country/Region (2021-2026) & (\$ millions)

Table 30. Global EV Holistic Thermal Management Revenue Market Share by Country/Region (2021-2026)

Table 31. Americas EV Holistic Thermal Management Market Size by Country (2021-2026) & (\$ millions)

Table 32. Americas EV Holistic Thermal Management Market Size Market Share by Country (2021-2026)

Table 33. Americas EV Holistic Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 34. Americas EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)

Table 35. Americas EV Holistic Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 36. Americas EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

Table 37. APAC EV Holistic Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 38. APAC EV Holistic Thermal Management Market Size Market Share by Region (2021-2026)

Table 39. APAC EV Holistic Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 40. APAC EV Holistic Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 41. Europe EV Holistic Thermal Management Market Size by Country (2021-2026) & (\$ millions)

Table 42. Europe EV Holistic Thermal Management Market Size Market Share by Country (2021-2026)

Table 43. Europe EV Holistic Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 44. Europe EV Holistic Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 45. Middle East & Africa EV Holistic Thermal Management Market Size by Region (2021-2026) & (\$ millions)

Table 46. Middle East & Africa EV Holistic Thermal Management Market Size by Type (2021-2026) & (\$ millions)

Table 47. Middle East & Africa EV Holistic Thermal Management Market Size by Application (2021-2026) & (\$ millions)

Table 48. Key Market Drivers & Growth Opportunities of EV Holistic Thermal Management

Table 49. Key Market Challenges & Risks of EV Holistic Thermal Management

Table 50. Key Industry Trends of EV Holistic Thermal Management

Table 51. Global EV Holistic Thermal Management Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 52. Global EV Holistic Thermal Management Market Size Market Share Forecast by Region (2027-2032)

Table 53. Global EV Holistic Thermal Management Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 54. Global EV Holistic Thermal Management Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 55. DENSO Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 56. DENSO EV Holistic Thermal Management Product Offered

Table 57. DENSO EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 58. DENSO Main Business

Table 59. DENSO Latest Developments

Table 60. Hanon Systems Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 61. Hanon Systems EV Holistic Thermal Management Product Offered

Table 62. Hanon Systems EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 63. Hanon Systems Main Business

Table 64. Hanon Systems Latest Developments

Table 65. Valeo Details, Company Type, EV Holistic Thermal Management Area Served

and Its Competitors

Table 66. Valeo EV Holistic Thermal Management Product Offered

Table 67. Valeo EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 68. Valeo Main Business

Table 69. Valeo Latest Developments

Table 70. MAHLE GmbH Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 71. MAHLE GmbH EV Holistic Thermal Management Product Offered

Table 72. MAHLE GmbH EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 73. MAHLE GmbH Main Business

Table 74. MAHLE GmbH Latest Developments

Table 75. Sanhua Intelligent Controls Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 76. Sanhua Intelligent Controls EV Holistic Thermal Management Product Offered

Table 77. Sanhua Intelligent Controls EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 78. Sanhua Intelligent Controls Main Business

Table 79. Sanhua Intelligent Controls Latest Developments

Table 80. Sanden Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 81. Sanden EV Holistic Thermal Management Product Offered

Table 82. Sanden EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 83. Sanden Main Business

Table 84. Sanden Latest Developments

Table 85. Aotecar Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 86. Aotecar EV Holistic Thermal Management Product Offered

Table 87. Aotecar EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 88. Aotecar Main Business

Table 89. Aotecar Latest Developments

Table 90. Yinlun Machinery Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 91. Yinlun Machinery EV Holistic Thermal Management Product Offered

Table 92. Yinlun Machinery EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 93. Yinlun Machinery Main Business
Table 94. Yinlun Machinery Latest Developments
Table 95. HASCO Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors
Table 96. HASCO EV Holistic Thermal Management Product Offered
Table 97. HASCO EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 98. HASCO Main Business
Table 99. HASCO Latest Developments
Table 100. Songz Automobile Air Conditioning Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors
Table 101. Songz Automobile Air Conditioning EV Holistic Thermal Management Product Offered
Table 102. Songz Automobile Air Conditioning EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 103. Songz Automobile Air Conditioning Main Business
Table 104. Songz Automobile Air Conditioning Latest Developments
Table 105. Tuopu Group Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors
Table 106. Tuopu Group EV Holistic Thermal Management Product Offered
Table 107. Tuopu Group EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 108. Tuopu Group Main Business
Table 109. Tuopu Group Latest Developments
Table 110. Zhongding Group Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors
Table 111. Zhongding Group EV Holistic Thermal Management Product Offered
Table 112. Zhongding Group EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 113. Zhongding Group Main Business
Table 114. Zhongding Group Latest Developments
Table 115. Feilong Auto Components Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors
Table 116. Feilong Auto Components EV Holistic Thermal Management Product Offered
Table 117. Feilong Auto Components EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 118. Feilong Auto Components Main Business
Table 119. Feilong Auto Components Latest Developments

Table 120. Tenglong Auto Parts Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 121. Tenglong Auto Parts EV Holistic Thermal Management Product Offered

Table 122. Tenglong Auto Parts EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 123. Tenglong Auto Parts Main Business

Table 124. Tenglong Auto Parts Latest Developments

Table 125. Senior Flexonics Details, Company Type, EV Holistic Thermal Management Area Served and Its Competitors

Table 126. Senior Flexonics EV Holistic Thermal Management Product Offered

Table 127. Senior Flexonics EV Holistic Thermal Management Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 128. Senior Flexonics Main Business

Table 129. Senior Flexonics Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. EV Holistic Thermal Management Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global EV Holistic Thermal Management Market Size Growth Rate (2021-2032) (\$ millions)

Figure 6. EV Holistic Thermal Management Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. EV Holistic Thermal Management Sales Market Share by Country/Region (2025)

Figure 8. EV Holistic Thermal Management Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 9. Global EV Holistic Thermal Management Market Size Market Share by Type in 2025

Figure 10. Global EV Holistic Thermal Management Market Size Market Share by Sales Channel in 2025

Figure 11. Global EV Holistic Thermal Management Market Size Market Share by Vehicle Use in 2025

Figure 12. EV Holistic Thermal Management in BEV

Figure 13. Global EV Holistic Thermal Management Market: BEV (2021-2026) & (\$ millions)

Figure 14. EV Holistic Thermal Management in PHEV

Figure 15. Global EV Holistic Thermal Management Market: PHEV (2021-2026) & (\$ millions)

Figure 16. Global EV Holistic Thermal Management Market Size Market Share by Application in 2025

Figure 17. Global EV Holistic Thermal Management Revenue Market Share by Player in 2025

Figure 18. Global EV Holistic Thermal Management Market Size Market Share by Region (2021-2026)

Figure 19. Americas EV Holistic Thermal Management Market Size 2021-2026 (\$ millions)

Figure 20. APAC EV Holistic Thermal Management Market Size 2021-2026 (\$ millions)

Figure 21. Europe EV Holistic Thermal Management Market Size 2021-2026 (\$ millions)

Figure 22. Middle East & Africa EV Holistic Thermal Management Market Size

2021-2026 (\$ millions)

Figure 23. Americas EV Holistic Thermal Management Value Market Share by Country in 2025

Figure 24. United States EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 25. Canada EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 26. Mexico EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 27. Brazil EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 28. APAC EV Holistic Thermal Management Market Size Market Share by Region in 2025

Figure 29. APAC EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)

Figure 30. APAC EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

Figure 31. China EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 32. Japan EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 33. South Korea EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 34. Southeast Asia EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 35. India EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 36. Australia EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 37. Europe EV Holistic Thermal Management Market Size Market Share by Country in 2025

Figure 38. Europe EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)

Figure 39. Europe EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

Figure 40. Germany EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 41. France EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 42. UK EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 43. Italy EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 44. Russia EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 45. Middle East & Africa EV Holistic Thermal Management Market Size Market Share by Region (2021-2026)

Figure 46. Middle East & Africa EV Holistic Thermal Management Market Size Market Share by Type (2021-2026)

Figure 47. Middle East & Africa EV Holistic Thermal Management Market Size Market Share by Application (2021-2026)

Figure 48. Egypt EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 49. South Africa EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 50. Israel EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 51. Turkey EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 52. GCC Countries EV Holistic Thermal Management Market Size Growth 2021-2026 (\$ millions)

Figure 53. Americas EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 54. APAC EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 55. Europe EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 56. Middle East & Africa EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 57. United States EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 58. Canada EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 59. Mexico EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 60. Brazil EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 61. China EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 62. Japan EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 63. Korea EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 64. Southeast Asia EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 65. India EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 66. Australia EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 67. Germany EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 68. France EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 69. UK EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 70. Italy EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 71. Russia EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 72. Egypt EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 73. South Africa EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 74. Israel EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 75. Turkey EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

Figure 76. Global EV Holistic Thermal Management Market Size Market Share Forecast by Type (2027-2032)

Figure 77. Global EV Holistic Thermal Management Market Size Market Share Forecast by Application (2027-2032)

Figure 78. GCC Countries EV Holistic Thermal Management Market Size 2027-2032 (\$ millions)

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