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Global Industrial Battery Thermal Management System (BTMS) Market Growth 2026-2032

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Abstracts

The global Industrial Battery Thermal Management System (BTMS) market size is predicted to grow from US$ 1125 million in 2025 to US$ 2182 million in 2032; it is expected to grow at a CAGR of 9.6% from 2026 to 2032.

Industrial Battery Thermal Management System refers to an active cooling, heating and coolant-control unit designed to maintain the operating temperature and temperature uniformity of stationary, commercial-vehicle, industrial-vehicle, rail, marine or other industrial battery systems.

The market includes battery-cabinet air conditioners, liquid-cooling chillers, coolant-distribution and temperature-control units, heat-pump BTMS units and combined battery cooling-and-heating modules. A qualifying product must include an active thermal-control function and be supplied as a complete operating unit.

Passenger-car BTMS, complete battery packs, battery cabinets, cold plates, pumps, valves, fans, thermal-interface materials, passive insulation, BMS software and generic industrial HVAC products are excluded.

The 2025 benchmark ASP is US$7,000 per unit, global sales volume is approximately 164.286k units, and the modeled average gross margin is approximately 31%.

The upstream industry chain includes compressors, pumps, fans, heat exchangers, cold plates, valves, sensors, controllers, refrigerants, coolants, pipes and quick connectors. The midstream includes refrigeration-system design, hydraulic-loop integration, control development, brazing, assembly, charging, leak testing and performance validation. The downstream mainly covers stationary energy storage, commercial and off-highway

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vehicles, industrial vehicles, rail and marine systems, and critical backup-power applications.

The market is shifting from basic enclosure air conditioning toward direct liquid cooling of battery modules. Air cooling remains cost-effective for lower heat loads, but liquid cooling provides more controlled heat transfer and better temperature uniformity in high-energy-density battery systems.

Stationary battery studies show that thermal-management design affects temperature distribution, efficiency, degradation and safety. The appropriate solution depends on cell chemistry, battery geometry, operating rate, ambient conditions and the required level of redundancy.

Temperature uniformity is becoming as important as maximum battery temperature. Large temperature differences between cells or modules can cause uneven ageing, inconsistent state-of-charge behavior and earlier replacement of the overall battery system.

Industrial BTMS increasingly combines cooling and heating. In cold conditions, heating supports charging availability and reduces lithium-plating risk, while active cooling limits excessive temperatures during high-power operation.

The BTMS and BMS perform different functions. The BMS measures battery state and determines thermal demand, while the BTMS physically moves heat through refrigerant, coolant or air circuits. Industrial products increasingly use CAN, Modbus or other communication interfaces to coordinate both systems. Modine’s commercial-vehicle BTMS documentation explicitly distinguishes the BMS control function from the physical BTMS cooling and heating system.

Liquid cooling increases system complexity because coolant compatibility, cleanliness, leakage, corrosion, pump reliability and air removal become important. Manufacturers are therefore placing greater emphasis on integrated leak detection, automatic filling, pressure monitoring and material compatibility.

For stationary energy storage, compact side-mounted and cabinet-integrated chillers are becoming more common. Pfannenberg provides side-mounted and internal standalone liquid-cooling solutions specifically developed for outdoor lithium-ion battery storage cabinets, while BlackShields offers air- and liquid-cooling products across a wide range of cooling capacities.

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Future competition will focus on lower auxiliary power consumption, wider operating temperatures, higher ingress protection, refrigerant compliance, remote diagnostics, pump redundancy and tighter coolant-temperature control.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Industrial Battery Thermal Management System (BTMS) 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 Industrial Battery Thermal Management System (BTMS) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Industrial Battery Thermal Management System (BTMS) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Industrial Battery Thermal Management System (BTMS) 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 Industrial Battery Thermal Management System (BTMS).

This report presents a comprehensive overview, market shares, and growth opportunities of Industrial Battery Thermal Management System (BTMS) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

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Small Capacity: ?5 kW

Medium Capacity: >5–15 kW

Large Capacity: >15–40 kW

High Capacity: >40 kW

Segmentation by Heat-Rejection Configuration:

Air-Cooled Condenser Type

Liquid-Cooled Condenser Type

Free-Cooling-Assisted Type

Segmentation by Coolant Supply Temperature Control:

Standard Control: ±2°C or Above

Precision Control: ±1–2°C

High-Precision Control: Better than ±1°C

Segmentation by Application:

Energy Storage

Transportation

Industrial Equipment

Infrastructure & Backup Power

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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

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- 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.

- Modine Manufacturing Company
- Ennovation Technology Sp. z o.o.
- Pfannenberg Europe GmbH
- Rittal GmbH & Co. KG
- Airsys Cooling Technologies Inc.
- Kooltronic, Inc.
- Shenzhen Envicool Technology Co., Ltd.
- Sanhe Tongfei Refrigeration Co., Ltd.
- Suzhou BlackShields Environment Co., Ltd.
- Zhengzhou Guchen Industry Co., Ltd.

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Industrial Battery Thermal Management System (BTMS) market?

What factors are driving Industrial Battery Thermal Management System (BTMS) market growth, globally and by region?

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

How do Industrial Battery Thermal Management System (BTMS) market opportunities vary by end market size?

How does Industrial Battery Thermal Management System (BTMS) break out by Type, by Application?

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