

Global Seat-Level Thermal Comfort System Market Growth 2026-2032

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Abstracts

The global Seat-Level Thermal Comfort System market size is predicted to grow from US\$ 5071 million in 2025 to US\$ 10260 million in 2032; it is expected to grow at a CAGR of 10.6% from 2026 to 2032.

Seat-level thermal comfort systems are integrated vehicle seat technologies designed to regulate the temperature of the occupant-seat interface for enhanced comfort. These systems typically include seat heating elements (resistive or carbon-based heaters), seat ventilation/active cooling systems (integrated fans and air distribution channels), and intelligent control units with sensor feedback. Unlike cabin-wide HVAC systems that condition the entire interior volume, seat-level systems provide localized thermal management, offering faster response times, lower energy consumption, and personalized comfort for individual occupants. Key technologies include thermoelectric devices (Peltier elements), positive temperature coefficient heaters, brushless axial fans, and smart climate control modules integrated with vehicle CAN bus systems. From a value chain perspective, upstream includes component suppliers (motors, fans, sensors, heating wires, thermoelectric modules, foam materials, fabric/leather upholstery); midstream involves system integration, module assembly, quality testing, and OEM supply; downstream demand spans passenger vehicles (luxury, premium, and increasingly mid-range segments), commercial vehicles, electric vehicles, and aftermarket. In 2025, the average selling price is approximately US\$120 per set (weighted average across heating, ventilation, and combined systems), global sales volume is about 43,200k sets, and gross margins generally range from 15% to 25%, driven by component costs, system complexity, and OEM brand positioning.

The seat-level thermal comfort system market is experiencing robust growth driven by the accelerating global shift toward electric vehicles. Unlike conventional internal

combustion engine vehicles that generate abundant waste heat for cabin warming, EVs require efficient, localized heating solutions to preserve battery range. Seat heating consumes significantly less energy than cabin air heating, making it a preferred thermal management strategy for EV manufacturers. Studies indicate that seat-based heating can reduce HVAC energy consumption by approximately 30-40% in cold weather conditions, directly translating to extended driving range.

Another key trend is the expansion of ventilated and active cooling systems from luxury vehicles into premium and mid-range segments. As consumers become more aware of the benefits of seat ventilation—particularly in hot climates where perspiration buildup causes discomfort—automakers are increasingly offering cooled seats as optional or standard features across broader model ranges. The integration of active cooling via thermoelectric devices or integrated fans enables rapid seat surface temperature reduction, addressing the common problem of sun-baked seats that can exceed temperatures.

The market is also witnessing technological convergence toward intelligent, personalized thermal management. Next-generation systems incorporate embedded thermistors, occupancy sensors, and infrared sensors to dynamically adjust heating or cooling intensity based on real-time occupant conditions and ambient temperature. Smart control algorithms can learn individual user preferences over time, enabling automatic seat preconditioning via smartphone apps. This personalization trend is particularly pronounced in the Chinese market, where domestic EV brands have pioneered advanced seat comfort features as key differentiators.

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

This Insight Report provides a comprehensive analysis of the global Seat-Level Thermal Comfort System 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 Seat-Level Thermal Comfort System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique

position in an accelerating global Seat-Level Thermal Comfort System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Seat-Level Thermal Comfort System 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 Seat-Level Thermal Comfort System.

This report presents a comprehensive overview, market shares, and growth opportunities of Seat-Level Thermal Comfort System market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Leather-Compatible System

Fabric-Compatible System

Others

Segmentation by Power Consumption:

Standard Efficiency (
High Efficiency (50-100W per seat)

Ultra-Efficient for EV (

Segmentation by Heating Element Type:

Wire-Based Heater

Carbon Fiber Heater

Graphene Film Heater

Printed Conductive Ink Heater

Segmentation by Application:

Passenger Vehicle (Luxury/Premium/Mid-Range)

Commercial Vehicle (Truck/Bus)

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

Gentherm Incorporated

Lear Corporation

Adient plc

Toyota Boshoku Corporation

Hyundai Transys

Forvia (Faurecia)

AEW (Daechang Seat Co., Ltd.)

Brose Fahrzeugteile SE & Co. KG

Leggett & Platt, Inc.

TangTring Seating Technology (Tangqun)

Xinzheng Auto Parts Co., Ltd.

Hyundai Wia Corporation

I.G. Bauerhin GmbH

Continental AG

Key Questions Addressed in this Report

What is the 10-year outlook for the global Seat-Level Thermal Comfort System market?

What factors are driving Seat-Level Thermal Comfort System market growth, globally and by region?

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

How do Seat-Level Thermal Comfort System market opportunities vary by end market size?

How does Seat-Level Thermal Comfort System break out by Type, by Application?

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 Seat-Level Thermal Comfort System Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Seat-Level Thermal Comfort System by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Seat-Level Thermal Comfort System by Country/Region, 2021, 2025 & 2032
- 2.2 Seat-Level Thermal Comfort System Segment by Type
 - 2.2.1 Leather-Compatible System
 - 2.2.2 Fabric-Compatible System
 - 2.2.3 Others
 - 2.2.4 Seat-Level Thermal Comfort System Sales by Type
 - 2.2.4.1 Global Seat-Level Thermal Comfort System Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Seat-Level Thermal Comfort System Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Seat-Level Thermal Comfort System Sale Price by Type (2021-2026)

2.3 Seat-Level Thermal Comfort System Segment by Power Consumption

- 2.3.1 Standard Efficiency (2.3.2 High Efficiency (50-100W per seat)
- 2.3.3 Ultra-Efficient for EV (2.3.4 Seat-Level Thermal Comfort System Sales by Power Consumption
 - 2.3.4.1 Global Seat-Level Thermal Comfort System Sales Market Share by Power Consumption (2021-2026)
 - 2.3.4.2 Global Seat-Level Thermal Comfort System Revenue and Market Share by Power Consumption (2021-2026)

- 2.3.4.3 Global Seat-Level Thermal Comfort System Sale Price by Power Consumption (2021-2026)
- 2.4 Seat-Level Thermal Comfort System Segment by Heating Element Type
 - 2.4.1 Wire-Based Heater
 - 2.4.2 Carbon Fiber Heater
 - 2.4.3 Graphene Film Heater
 - 2.4.4 Printed Conductive Ink Heater
 - 2.4.5 Seat-Level Thermal Comfort System Sales by Heating Element Type
 - 2.4.5.1 Global Seat-Level Thermal Comfort System Sales Market Share by Heating Element Type (2021-2026)
 - 2.4.5.2 Global Seat-Level Thermal Comfort System Revenue and Market Share by Heating Element Type (2021-2026)
 - 2.4.5.3 Global Seat-Level Thermal Comfort System Sale Price by Heating Element Type (2021-2026)
- 2.5 Seat-Level Thermal Comfort System Segment by Application
 - 2.5.1 Passenger Vehicle (Luxury/Premium/Mid-Range)
 - 2.5.2 Commercial Vehicle (Truck/Bus)
 - 2.5.3 Seat-Level Thermal Comfort System Sales by Application
 - 2.5.3.1 Global Seat-Level Thermal Comfort System Sale Market Share by Application (2021-2026)
 - 2.5.3.2 Global Seat-Level Thermal Comfort System Revenue and Market Share by Application (2021-2026)
 - 2.5.3.3 Global Seat-Level Thermal Comfort System Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Seat-Level Thermal Comfort System Breakdown Data by Company
 - 3.1.1 Global Seat-Level Thermal Comfort System Annual Sales by Company (2021-2026)
 - 3.1.2 Global Seat-Level Thermal Comfort System Sales Market Share by Company (2021-2026)
- 3.2 Global Seat-Level Thermal Comfort System Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Seat-Level Thermal Comfort System Revenue by Company (2021-2026)
 - 3.2.2 Global Seat-Level Thermal Comfort System Revenue Market Share by Company (2021-2026)
- 3.3 Global Seat-Level Thermal Comfort System Sale Price by Company
- 3.4 Key Manufacturers Seat-Level Thermal Comfort System Producing Area

Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Seat-Level Thermal Comfort System Product Location

Distribution

3.4.2 Players Seat-Level Thermal Comfort System Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

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

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR SEAT-LEVEL THERMAL COMFORT SYSTEM BY GEOGRAPHIC REGION

4.1 World Historic Seat-Level Thermal Comfort System Market Size by Geographic Region (2021-2026)

4.1.1 Global Seat-Level Thermal Comfort System Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Seat-Level Thermal Comfort System Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Seat-Level Thermal Comfort System Market Size by Country/Region (2021-2026)

4.2.1 Global Seat-Level Thermal Comfort System Annual Sales by Country/Region (2021-2026)

4.2.2 Global Seat-Level Thermal Comfort System Annual Revenue by Country/Region (2021-2026)

4.3 Americas Seat-Level Thermal Comfort System Sales Growth

4.4 APAC Seat-Level Thermal Comfort System Sales Growth

4.5 Europe Seat-Level Thermal Comfort System Sales Growth

4.6 Middle East & Africa Seat-Level Thermal Comfort System Sales Growth

5 AMERICAS

5.1 Americas Seat-Level Thermal Comfort System Sales by Country

5.1.1 Americas Seat-Level Thermal Comfort System Sales by Country (2021-2026)

5.1.2 Americas Seat-Level Thermal Comfort System Revenue by Country (2021-2026)

5.2 Americas Seat-Level Thermal Comfort System Sales by Type (2021-2026)

5.3 Americas Seat-Level Thermal Comfort System Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Seat-Level Thermal Comfort System Sales by Region

6.1.1 APAC Seat-Level Thermal Comfort System Sales by Region (2021-2026)

6.1.2 APAC Seat-Level Thermal Comfort System Revenue by Region (2021-2026)

6.2 APAC Seat-Level Thermal Comfort System Sales by Type (2021-2026)

6.3 APAC Seat-Level Thermal Comfort System Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Seat-Level Thermal Comfort System by Country

7.1.1 Europe Seat-Level Thermal Comfort System Sales by Country (2021-2026)

7.1.2 Europe Seat-Level Thermal Comfort System Revenue by Country (2021-2026)

7.2 Europe Seat-Level Thermal Comfort System Sales by Type (2021-2026)

7.3 Europe Seat-Level Thermal Comfort System Sales 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 Seat-Level Thermal Comfort System by Country

8.1.1 Middle East & Africa Seat-Level Thermal Comfort System Sales by Country (2021-2026)

8.1.2 Middle East & Africa Seat-Level Thermal Comfort System Revenue by Country (2021-2026)

8.2 Middle East & Africa Seat-Level Thermal Comfort System Sales by Type

(2021-2026)

8.3 Middle East & Africa Seat-Level Thermal Comfort System Sales 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 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Seat-Level Thermal Comfort System

10.3 Manufacturing Process Analysis of Seat-Level Thermal Comfort System

10.4 Industry Chain Structure of Seat-Level Thermal Comfort System

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Seat-Level Thermal Comfort System Distributors

11.3 Seat-Level Thermal Comfort System Customer

12 WORLD FORECAST REVIEW FOR SEAT-LEVEL THERMAL COMFORT SYSTEM BY GEOGRAPHIC REGION

12.1 Global Seat-Level Thermal Comfort System Market Size Forecast by Region

12.1.1 Global Seat-Level Thermal Comfort System Forecast by Region (2027-2032)

12.1.2 Global Seat-Level Thermal Comfort System Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Seat-Level Thermal Comfort System Forecast by Type (2027-2032)

12.7 Global Seat-Level Thermal Comfort System Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Gentherm Incorporated

13.1.1 Gentherm Incorporated Company Information

13.1.2 Gentherm Incorporated Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.1.3 Gentherm Incorporated Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Gentherm Incorporated Main Business Overview

13.1.5 Gentherm Incorporated Latest Developments

13.2 Lear Corporation

13.2.1 Lear Corporation Company Information

13.2.2 Lear Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.2.3 Lear Corporation Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Lear Corporation Main Business Overview

13.2.5 Lear Corporation Latest Developments

13.3 Adient plc

13.3.1 Adient plc Company Information

13.3.2 Adient plc Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.3.3 Adient plc Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Adient plc Main Business Overview

13.3.5 Adient plc Latest Developments

13.4 Toyota Boshoku Corporation

13.4.1 Toyota Boshoku Corporation Company Information

13.4.2 Toyota Boshoku Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.4.3 Toyota Boshoku Corporation Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Toyota Boshoku Corporation Main Business Overview

13.4.5 Toyota Boshoku Corporation Latest Developments

13.5 Hyundai Transys

13.5.1 Hyundai Transys Company Information

13.5.2 Hyundai Transys Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.5.3 Hyundai Transys Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Hyundai Transys Main Business Overview

13.5.5 Hyundai Transys Latest Developments

13.6 Forvia (Faurecia)

13.6.1 Forvia (Faurecia) Company Information

13.6.2 Forvia (Faurecia) Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.6.3 Forvia (Faurecia) Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Forvia (Faurecia) Main Business Overview

13.6.5 Forvia (Faurecia) Latest Developments

13.7 AEW (Daechang Seat Co., Ltd.)

13.7.1 AEW (Daechang Seat Co., Ltd.) Company Information

13.7.2 AEW (Daechang Seat Co., Ltd.) Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.7.3 AEW (Daechang Seat Co., Ltd.) Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 AEW (Daechang Seat Co., Ltd.) Main Business Overview

13.7.5 AEW (Daechang Seat Co., Ltd.) Latest Developments

13.8 Brose Fahrzeugteile SE & Co. KG

13.8.1 Brose Fahrzeugteile SE & Co. KG Company Information

13.8.2 Brose Fahrzeugteile SE & Co. KG Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.8.3 Brose Fahrzeugteile SE & Co. KG Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Brose Fahrzeugteile SE & Co. KG Main Business Overview

13.8.5 Brose Fahrzeugteile SE & Co. KG Latest Developments

13.9 Leggett & Platt, Inc.

13.9.1 Leggett & Platt, Inc. Company Information

13.9.2 Leggett & Platt, Inc. Seat-Level Thermal Comfort System Product Portfolios and Specifications

13.9.3 Leggett & Platt, Inc. Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Leggett & Platt, Inc. Main Business Overview

- 13.9.5 Leggett & Platt, Inc. Latest Developments
- 13.10 TangTring Seating Technology (Tangqun)
 - 13.10.1 TangTring Seating Technology (Tangqun) Company Information
 - 13.10.2 TangTring Seating Technology (Tangqun) Seat-Level Thermal Comfort System Product Portfolios and Specifications
 - 13.10.3 TangTring Seating Technology (Tangqun) Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 TangTring Seating Technology (Tangqun) Main Business Overview
 - 13.10.5 TangTring Seating Technology (Tangqun) Latest Developments
- 13.11 Xinzheng Auto Parts Co., Ltd.
 - 13.11.1 Xinzheng Auto Parts Co., Ltd. Company Information
 - 13.11.2 Xinzheng Auto Parts Co., Ltd. Seat-Level Thermal Comfort System Product Portfolios and Specifications
 - 13.11.3 Xinzheng Auto Parts Co., Ltd. Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Xinzheng Auto Parts Co., Ltd. Main Business Overview
 - 13.11.5 Xinzheng Auto Parts Co., Ltd. Latest Developments
- 13.12 Hyundai Wia Corporation
 - 13.12.1 Hyundai Wia Corporation Company Information
 - 13.12.2 Hyundai Wia Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications
 - 13.12.3 Hyundai Wia Corporation Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Hyundai Wia Corporation Main Business Overview
 - 13.12.5 Hyundai Wia Corporation Latest Developments
- 13.13 I.G. Bauerhin GmbH
 - 13.13.1 I.G. Bauerhin GmbH Company Information
 - 13.13.2 I.G. Bauerhin GmbH Seat-Level Thermal Comfort System Product Portfolios and Specifications
 - 13.13.3 I.G. Bauerhin GmbH Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 I.G. Bauerhin GmbH Main Business Overview
 - 13.13.5 I.G. Bauerhin GmbH Latest Developments
- 13.14 Continental AG
 - 13.14.1 Continental AG Company Information
 - 13.14.2 Continental AG Seat-Level Thermal Comfort System Product Portfolios and Specifications
 - 13.14.3 Continental AG Seat-Level Thermal Comfort System Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Continental AG Main Business Overview

13.14.5 Continental AG Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Seat-Level Thermal Comfort System Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Seat-Level Thermal Comfort System Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Leather-Compatible System

Table 4. Major Players of Fabric-Compatible System

Table 5. Major Players of Others

Table 6. Global Seat-Level Thermal Comfort System Sales by Type (2021-2026) & (K Sets)

Table 7. Global Seat-Level Thermal Comfort System Sales Market Share by Type (2021-2026)

Table 8. Global Seat-Level Thermal Comfort System Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Seat-Level Thermal Comfort System Revenue Market Share by Type (2021-2026)

Table 10. Global Seat-Level Thermal Comfort System Sale Price by Type (2021-2026) & (US\$/Set)

Table 11. Major Players of Standard Efficiency (Table 12. Major Players of High Efficiency (50-100W per seat)

Table 13. Major Players of Ultra-Efficient for EV (Table 14. Global Seat-Level Thermal Comfort System Sales by Power Consumption (2021-2026) & (K Sets)

Table 15. Global Seat-Level Thermal Comfort System Sales Market Share by Power Consumption (2021-2026)

Table 16. Global Seat-Level Thermal Comfort System Revenue by Power Consumption (2021-2026) & (\$ million)

Table 17. Global Seat-Level Thermal Comfort System Revenue Market Share by Power Consumption (2021-2026)

Table 18. Global Seat-Level Thermal Comfort System Sale Price by Power Consumption (2021-2026) & (US\$/Set)

Table 19. Major Players of Wire-Based Heater

Table 20. Major Players of Carbon Fiber Heater

Table 21. Major Players of Graphene Film Heater

Table 22. Major Players of Printed Conductive Ink Heater

Table 23. Global Seat-Level Thermal Comfort System Sales by Heating Element Type (2021-2026) & (K Sets)

Table 24. Global Seat-Level Thermal Comfort System Sales Market Share by Heating Element Type (2021-2026)

Table 25. Global Seat-Level Thermal Comfort System Revenue by Heating Element Type (2021-2026) & (\$ million)

Table 26. Global Seat-Level Thermal Comfort System Revenue Market Share by Heating Element Type (2021-2026)

Table 27. Global Seat-Level Thermal Comfort System Sale Price by Heating Element Type (2021-2026) & (US\$/Set)

Table 28. Global Seat-Level Thermal Comfort System Sale by Application (2021-2026) & (K Sets)

Table 29. Global Seat-Level Thermal Comfort System Sale Market Share by Application (2021-2026)

Table 30. Global Seat-Level Thermal Comfort System Revenue by Application (2021-2026) & (\$ million)

Table 31. Global Seat-Level Thermal Comfort System Revenue Market Share by Application (2021-2026)

Table 32. Global Seat-Level Thermal Comfort System Sale Price by Application (2021-2026) & (US\$/Set)

Table 33. Global Seat-Level Thermal Comfort System Sales by Company (2021-2026) & (K Sets)

Table 34. Global Seat-Level Thermal Comfort System Sales Market Share by Company (2021-2026)

Table 35. Global Seat-Level Thermal Comfort System Revenue by Company (2021-2026) & (\$ millions)

Table 36. Global Seat-Level Thermal Comfort System Revenue Market Share by Company (2021-2026)

Table 37. Global Seat-Level Thermal Comfort System Sale Price by Company (2021-2026) & (US\$/Set)

Table 38. Key Manufacturers Seat-Level Thermal Comfort System Producing Area Distribution and Sales Area

Table 39. Players Seat-Level Thermal Comfort System Products Offered

Table 40. Seat-Level Thermal Comfort System Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 41. New Products and Potential Entrants

Table 42. Market M&A Activity & Strategy

Table 43. Global Seat-Level Thermal Comfort System Sales by Geographic Region (2021-2026) & (K Sets)

Table 44. Global Seat-Level Thermal Comfort System Sales Market Share Geographic Region (2021-2026)

Table 45. Global Seat-Level Thermal Comfort System Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 46. Global Seat-Level Thermal Comfort System Revenue Market Share by Geographic Region (2021-2026)

Table 47. Global Seat-Level Thermal Comfort System Sales by Country/Region (2021-2026) & (K Sets)

Table 48. Global Seat-Level Thermal Comfort System Sales Market Share by Country/Region (2021-2026)

Table 49. Global Seat-Level Thermal Comfort System Revenue by Country/Region (2021-2026) & (\$ millions)

Table 50. Global Seat-Level Thermal Comfort System Revenue Market Share by Country/Region (2021-2026)

Table 51. Americas Seat-Level Thermal Comfort System Sales by Country (2021-2026) & (K Sets)

Table 52. Americas Seat-Level Thermal Comfort System Sales Market Share by Country (2021-2026)

Table 53. Americas Seat-Level Thermal Comfort System Revenue by Country (2021-2026) & (\$ millions)

Table 54. Americas Seat-Level Thermal Comfort System Sales by Type (2021-2026) & (K Sets)

Table 55. Americas Seat-Level Thermal Comfort System Sales by Application (2021-2026) & (K Sets)

Table 56. APAC Seat-Level Thermal Comfort System Sales by Region (2021-2026) & (K Sets)

Table 57. APAC Seat-Level Thermal Comfort System Sales Market Share by Region (2021-2026)

Table 58. APAC Seat-Level Thermal Comfort System Revenue by Region (2021-2026) & (\$ millions)

Table 59. APAC Seat-Level Thermal Comfort System Sales by Type (2021-2026) & (K Sets)

Table 60. APAC Seat-Level Thermal Comfort System Sales by Application (2021-2026) & (K Sets)

Table 61. Europe Seat-Level Thermal Comfort System Sales by Country (2021-2026) & (K Sets)

Table 62. Europe Seat-Level Thermal Comfort System Revenue by Country (2021-2026) & (\$ millions)

Table 63. Europe Seat-Level Thermal Comfort System Sales by Type (2021-2026) & (K Sets)

Table 64. Europe Seat-Level Thermal Comfort System Sales by Application

(2021-2026) & (K Sets)

Table 65. Middle East & Africa Seat-Level Thermal Comfort System Sales by Country (2021-2026) & (K Sets)

Table 66. Middle East & Africa Seat-Level Thermal Comfort System Revenue Market Share by Country (2021-2026)

Table 67. Middle East & Africa Seat-Level Thermal Comfort System Sales by Type (2021-2026) & (K Sets)

Table 68. Middle East & Africa Seat-Level Thermal Comfort System Sales by Application (2021-2026) & (K Sets)

Table 69. Key Market Drivers & Growth Opportunities of Seat-Level Thermal Comfort System

Table 70. Key Market Challenges & Risks of Seat-Level Thermal Comfort System

Table 71. Key Industry Trends of Seat-Level Thermal Comfort System

Table 72. Seat-Level Thermal Comfort System Raw Material

Table 73. Key Suppliers of Raw Materials

Table 74. Seat-Level Thermal Comfort System Distributors List

Table 75. Seat-Level Thermal Comfort System Customer List

Table 76. Global Seat-Level Thermal Comfort System Sales Forecast by Region (2027-2032) & (K Sets)

Table 77. Global Seat-Level Thermal Comfort System Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Americas Seat-Level Thermal Comfort System Sales Forecast by Country (2027-2032) & (K Sets)

Table 79. Americas Seat-Level Thermal Comfort System Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. APAC Seat-Level Thermal Comfort System Sales Forecast by Region (2027-2032) & (K Sets)

Table 81. APAC Seat-Level Thermal Comfort System Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 82. Europe Seat-Level Thermal Comfort System Sales Forecast by Country (2027-2032) & (K Sets)

Table 83. Europe Seat-Level Thermal Comfort System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Middle East & Africa Seat-Level Thermal Comfort System Sales Forecast by Country (2027-2032) & (K Sets)

Table 85. Middle East & Africa Seat-Level Thermal Comfort System Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Global Seat-Level Thermal Comfort System Sales Forecast by Type (2027-2032) & (K Sets)

Table 87. Global Seat-Level Thermal Comfort System Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 88. Global Seat-Level Thermal Comfort System Sales Forecast by Application (2027-2032) & (K Sets)

Table 89. Global Seat-Level Thermal Comfort System Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 90. Gentherm Incorporated Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 91. Gentherm Incorporated Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 92. Gentherm Incorporated Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 93. Gentherm Incorporated Main Business

Table 94. Gentherm Incorporated Latest Developments

Table 95. Lear Corporation Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 96. Lear Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 97. Lear Corporation Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 98. Lear Corporation Main Business

Table 99. Lear Corporation Latest Developments

Table 100. Adient plc Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 101. Adient plc Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 102. Adient plc Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 103. Adient plc Main Business

Table 104. Adient plc Latest Developments

Table 105. Toyota Boshoku Corporation Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 106. Toyota Boshoku Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 107. Toyota Boshoku Corporation Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 108. Toyota Boshoku Corporation Main Business

Table 109. Toyota Boshoku Corporation Latest Developments

Table 110. Hyundai Transys Basic Information, Seat-Level Thermal Comfort System

Manufacturing Base, Sales Area and Its Competitors

Table 111. Hyundai Transys Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 112. Hyundai Transys Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 113. Hyundai Transys Main Business

Table 114. Hyundai Transys Latest Developments

Table 115. Forvia (Faurecia) Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 116. Forvia (Faurecia) Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 117. Forvia (Faurecia) Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 118. Forvia (Faurecia) Main Business

Table 119. Forvia (Faurecia) Latest Developments

Table 120. AEW (Daechang Seat Co., Ltd.) Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 121. AEW (Daechang Seat Co., Ltd.) Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 122. AEW (Daechang Seat Co., Ltd.) Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 123. AEW (Daechang Seat Co., Ltd.) Main Business

Table 124. AEW (Daechang Seat Co., Ltd.) Latest Developments

Table 125. Brose Fahrzeugteile SE & Co. KG Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 126. Brose Fahrzeugteile SE & Co. KG Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 127. Brose Fahrzeugteile SE & Co. KG Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 128. Brose Fahrzeugteile SE & Co. KG Main Business

Table 129. Brose Fahrzeugteile SE & Co. KG Latest Developments

Table 130. Leggett & Platt, Inc. Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 131. Leggett & Platt, Inc. Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 132. Leggett & Platt, Inc. Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 133. Leggett & Platt, Inc. Main Business

Table 134. Leggett & Platt, Inc. Latest Developments

Table 135. TangTring Seating Technology (Tangqun) Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 136. TangTring Seating Technology (Tangqun) Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 137. TangTring Seating Technology (Tangqun) Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 138. TangTring Seating Technology (Tangqun) Main Business

Table 139. TangTring Seating Technology (Tangqun) Latest Developments

Table 140. Xinzheng Auto Parts Co., Ltd. Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 141. Xinzheng Auto Parts Co., Ltd. Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 142. Xinzheng Auto Parts Co., Ltd. Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 143. Xinzheng Auto Parts Co., Ltd. Main Business

Table 144. Xinzheng Auto Parts Co., Ltd. Latest Developments

Table 145. Hyundai Wia Corporation Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 146. Hyundai Wia Corporation Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 147. Hyundai Wia Corporation Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 148. Hyundai Wia Corporation Main Business

Table 149. Hyundai Wia Corporation Latest Developments

Table 150. I.G. Bauerhin GmbH Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 151. I.G. Bauerhin GmbH Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 152. I.G. Bauerhin GmbH Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 153. I.G. Bauerhin GmbH Main Business

Table 154. I.G. Bauerhin GmbH Latest Developments

Table 155. Continental AG Basic Information, Seat-Level Thermal Comfort System Manufacturing Base, Sales Area and Its Competitors

Table 156. Continental AG Seat-Level Thermal Comfort System Product Portfolios and Specifications

Table 157. Continental AG Seat-Level Thermal Comfort System Sales (K Sets), Revenue (\$ Million), Price (US\$/Set) and Gross Margin (2021-2026)

Table 158. Continental AG Main Business

Table 159. Continental AG Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Seat-Level Thermal Comfort System
- Figure 2. Seat-Level Thermal Comfort System Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Seat-Level Thermal Comfort System Sales Growth Rate 2021-2032 (K Sets)
- Figure 7. Global Seat-Level Thermal Comfort System Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Seat-Level Thermal Comfort System Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Seat-Level Thermal Comfort System Sales Market Share by Country/Region (2025)
- Figure 10. Seat-Level Thermal Comfort System Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Leather-Compatible System
- Figure 12. Product Picture of Fabric-Compatible System
- Figure 13. Product Picture of Others
- Figure 14. Global Seat-Level Thermal Comfort System Sales Market Share by Type in 2026
- Figure 15. Global Seat-Level Thermal Comfort System Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Standard Efficiency (Figure 17. Product Picture of High Efficiency (50-100W per seat)
- Figure 18. Product Picture of Ultra-Efficient for EV (Figure 19. Global Seat-Level Thermal Comfort System Sales Market Share by Power Consumption in 2026
- Figure 20. Global Seat-Level Thermal Comfort System Revenue Market Share by Power Consumption (2021-2026)
- Figure 21. Product Picture of Wire-Based Heater
- Figure 22. Product Picture of Carbon Fiber Heater
- Figure 23. Product Picture of Graphene Film Heater
- Figure 24. Product Picture of Printed Conductive Ink Heater
- Figure 25. Global Seat-Level Thermal Comfort System Sales Market Share by Heating Element Type in 2026
- Figure 26. Global Seat-Level Thermal Comfort System Revenue Market Share by

Heating Element Type (2021-2026)

Figure 27. Seat-Level Thermal Comfort System Consumed in Passenger Vehicle (Luxury/Premium/Mid-Range)

Figure 28. Global Seat-Level Thermal Comfort System Market: Passenger Vehicle (Luxury/Premium/Mid-Range) (2021-2026) & (K Sets)

Figure 29. Seat-Level Thermal Comfort System Consumed in Commercial Vehicle (Truck/Bus)

Figure 30. Global Seat-Level Thermal Comfort System Market: Commercial Vehicle (Truck/Bus) (2021-2026) & (K Sets)

Figure 31. Global Seat-Level Thermal Comfort System Sale Market Share by Application (2025)

Figure 32. Global Seat-Level Thermal Comfort System Revenue Market Share by Application in 2025

Figure 33. Seat-Level Thermal Comfort System Sales by Company in 2025 (K Sets)

Figure 34. Global Seat-Level Thermal Comfort System Sales Market Share by Company in 2025

Figure 35. Seat-Level Thermal Comfort System Revenue by Company in 2025 (\$ millions)

Figure 36. Global Seat-Level Thermal Comfort System Revenue Market Share by Company in 2025

Figure 37. Global Seat-Level Thermal Comfort System Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Seat-Level Thermal Comfort System Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Seat-Level Thermal Comfort System Sales 2021-2026 (K Sets)

Figure 40. Americas Seat-Level Thermal Comfort System Revenue 2021-2026 (\$ millions)

Figure 41. APAC Seat-Level Thermal Comfort System Sales 2021-2026 (K Sets)

Figure 42. APAC Seat-Level Thermal Comfort System Revenue 2021-2026 (\$ millions)

Figure 43. Europe Seat-Level Thermal Comfort System Sales 2021-2026 (K Sets)

Figure 44. Europe Seat-Level Thermal Comfort System Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Seat-Level Thermal Comfort System Sales 2021-2026 (K Sets)

Figure 46. Middle East & Africa Seat-Level Thermal Comfort System Revenue 2021-2026 (\$ millions)

Figure 47. Americas Seat-Level Thermal Comfort System Sales Market Share by Country in 2025

Figure 48. Americas Seat-Level Thermal Comfort System Revenue Market Share by Country (2021-2026)

Figure 49. Americas Seat-Level Thermal Comfort System Sales Market Share by Type (2021-2026)

Figure 50. Americas Seat-Level Thermal Comfort System Sales Market Share by Application (2021-2026)

Figure 51. United States Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Seat-Level Thermal Comfort System Sales Market Share by Region in 2025

Figure 56. APAC Seat-Level Thermal Comfort System Revenue Market Share by Region (2021-2026)

Figure 57. APAC Seat-Level Thermal Comfort System Sales Market Share by Type (2021-2026)

Figure 58. APAC Seat-Level Thermal Comfort System Sales Market Share by Application (2021-2026)

Figure 59. China Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Seat-Level Thermal Comfort System Sales Market Share by Country in 2025

Figure 67. Europe Seat-Level Thermal Comfort System Revenue Market Share by Country (2021-2026)

Figure 68. Europe Seat-Level Thermal Comfort System Sales Market Share by Type

(2021-2026)

Figure 69. Europe Seat-Level Thermal Comfort System Sales Market Share by Application (2021-2026)

Figure 70. Germany Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Seat-Level Thermal Comfort System Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Seat-Level Thermal Comfort System Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Seat-Level Thermal Comfort System Sales Market Share by Application (2021-2026)

Figure 78. Egypt Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Seat-Level Thermal Comfort System Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Seat-Level Thermal Comfort System in 2026

Figure 84. Manufacturing Process Analysis of Seat-Level Thermal Comfort System

Figure 85. Industry Chain Structure of Seat-Level Thermal Comfort System

Figure 86. Channels of Distribution

Figure 87. Global Seat-Level Thermal Comfort System Sales Market Forecast by Region (2027-2032)

Figure 88. Global Seat-Level Thermal Comfort System Revenue Market Share Forecast by Region (2027-2032)

Figure 89. Global Seat-Level Thermal Comfort System Sales Market Share Forecast by

Type (2027-2032)

Figure 90. Global Seat-Level Thermal Comfort System Revenue Market Share Forecast by Type (2027-2032)

Figure 91. Global Seat-Level Thermal Comfort System Sales Market Share Forecast by Application (2027-2032)

Figure 92. Global Seat-Level Thermal Comfort System Revenue Market Share Forecast by Application (2027-2032)

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