

Global Thermal Management Module Market Growth 2026-2032

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Abstracts

The global Thermal Management Module market size is predicted to grow from US\$ 1723 million in 2025 to US\$ 3679 million in 2032; it is expected to grow at a CAGR of 11.6% from 2026 to 2032.

A thermal management module (TMM) is a highly integrated, 'smart' sub-assembly designed to regulate the temperature of critical components within electric vehicles (EVs), high-performance computing, and industrial power electronics. In the automotive sector, these modules have evolved from simple radiators and pumps into centralized 'super-manifolds' that synchronize the cooling and heating needs of the battery pack, electric motors, power inverters, and the passenger cabin. By consolidating multiple valves, pumps, and sensors into a single, compact unit, TMMs significantly reduce system weight, minimize coolant pressure drops, and simplify the vehicle's assembly process. In 2026, the market is defined by 'software-defined cooling,' where AI-driven control units predict thermal loads based on driving behavior or computational intensity, ensuring that systems operate within the narrow temperature windows required for maximum efficiency and longevity. Whether preventing thermal runaway in a lithium-ion battery or managing the heat flux of a next-generation AI processor, the TMM is the essential 'circulatory system' of modern high-power technology.

In 2025, global thermal management module production reached approximately 1039.55 k units, with an average global market price of around US\$ 1694 per unit. And global thermal management module production capacity reached approximately 1500 k units. The average gross margin in this industry reached 22.69%.

The upstream supply chain for thermal management modules is a specialized tier involving advanced material science and high-precision fluid control components. The

production of these modules requires high-performance polymers for multi-way valves, marine-grade aluminum for heat exchangers, and high-purity dielectric fluids for immersion cooling applications. Additionally, the integration of 'smart' features relies on a steady supply of automotive-grade microcontrollers and thermal interface materials (TIMs) like graphene-doped pastes. Key upstream suppliers for these essential materials include Mitsubishi Materials (supplying insulating substrates and high-accuracy thermistor sensors), DuPont (providing Kapton[®] polyimide films and high-performance polymers for thermal resistance), and ArcelorMittal (delivering specialized aluminum and steel alloys for high-durability module housings). These suppliers are critical for ensuring the modules can withstand the corrosive environments and high-pressure cycles inherent in long-term industrial and automotive use.

The downstream segment focuses on the integration of these modules into the next generation of electrified and automated platforms. At this stage, value is added through complex system calibration and 'digital twin' simulations that optimize heat flow across an entire vehicle or data center rack. Major downstream customers and high-volume institutional buyers include Tesla (utilizing highly integrated octovalve-style TMMs across its vehicle lineup), NVIDIA (incorporating advanced liquid-cooling modules into its Blackwell and Vera Rubin AI data center architectures), and Ford Motor Company (deploying modular thermal systems across its expanding fleet of electric commercial vans and trucks). The downstream market is currently shifting toward 'modular thermal-as-a-service,' where customers prioritize integrated platforms that offer plug-and-play compatibility with 800V high-voltage architectures and rapid-charging infrastructure.

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

This Insight Report provides a comprehensive analysis of the global Thermal Management Module 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 Thermal Management Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thermal Management Module market.

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

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

Segmentation by Type:

Refrigerant Module

Coolant Module

Integrate Module

Segmentation by Thermal Control Medium:

Water-Glycol Mixture

Refrigerant-Based

Others

Segmentation by Operating Voltage:

12V

400V

800V

Others

Segmentation by Application:

Automotive

Data Center

Others

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.

Denso Corporation

Valeo

MAHLE

Gentherm

Boyd Corporation

Heatex

Sanhua

Ningbo Tuopu Group

Yinlun

Hanon Systems

HYUNDAI WIA

Songz Automobile Air Conditioning

Changzhou Tenglong Auto Parts

Jiangsu Chaoli Electric Manufacture

Aisin

Xiezhong International Thermal Management System

Mande Electronics

Feilong Automotive Parts

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thermal Management Module market?

What factors are driving Thermal Management Module market growth, globally and by region?

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

How do Thermal Management Module market opportunities vary by end market size?

How does Thermal Management Module break out by Type, by Application?

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