

Global Thermal Management in Electric and Hybrid Vehicles Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Thermal Management in Electric and Hybrid Vehicles 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.

Thermal Management in Electric and Hybrid Vehicles refers to the overall engineering discipline and system architecture used in HEVs, PHEVs and BEVs to control the temperature and energy flows of all heat-relevant subsystems. It covers the internal-combustion engine (for hybrids), the traction battery pack, e-motor and e-axle, power electronics (inverter, on-board charger, DC/DC converter), on-board charging hardware and the cabin HVAC/heat-pump unit. By using coolant loops and cold plates or jackets, refrigerant circuits with chillers or direct battery cooling, heat pumps and PTC heaters, electric coolant pumps, electronic valves, electric compressors and dedicated control strategies, the vehicle coordinates heating, cooling, pre-conditioning and waste-heat recovery across operating modes such as electric drive, hybrid drive, fast charging and regenerative braking. The goal is to keep each subsystem within its optimal temperature window while improving overall energy efficiency, driving range and emissions performance (for hybrids), and maintaining safe operation and occupant comfort under diverse ambient conditions.

The supply chain for Thermal Management in Electric and Hybrid Vehicles can broadly be divided into three tiers. Upstream suppliers provide 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, EGR and waste-heat recovery heat exchangers, heat-pump assemblies, integrated thermal management modules (ITM/ICM), and hose/pipe and wiring assemblies, often co-developing system architecture and calibration with OEMs. Downstream, vehicle manufacturers and some battery, e-drive and engine integrators define the overall thermal concept for HEVs and EVs and source complete systems or major modules.

Thermal management in electric and hybrid vehicles has become a core discipline that quietly determines how these platforms perform in the real world: it influences energy efficiency, usable range, fast-charging robustness, component lifetime and all-climate comfort. As electrification moves from niche to mainstream, OEMs can no longer treat cooling and heating as add-on utilities around the powertrain. Instead, batteries, e-motors, inverters, on-board chargers, engines and transmissions in hybrids, as well as cabin HVAC, are managed as one interconnected thermal ecosystem. The ability to keep all these systems within tight temperature windows under city congestion, highway driving, steep gradients and repeated DC fast-charging is now a visible differentiator between brands and platforms.

From a technology perspective, thermal management in electric and hybrid vehicles is evolving from simple, component-level cooling loops to multi-loop, highly integrated architectures with strong software content. Early hybrids and EVs often relied on relatively basic glycol circuits for batteries and power electronics, with the engine cooling system and cabin HVAC largely separated. Newer designs increasingly adopt liquid-cooled battery packs with precision cold plates, dedicated loops for e-axes and inverters, compact chillers that couple refrigerant and coolant circuits, and high-efficiency heat pump systems using low-GWP refrigerants. In hybrids, thermal management also has to support fast engine warm-up, catalyst light-off and aftertreatment temperature control, often by sharing heat exchangers and coolant routes with the electrified side to save space and cost. Across both hybrids and EVs, integrated valve blocks, variable-speed pumps and e-compressors, combined with thermal domain controllers and model-based algorithms, enable pre-conditioning of batteries before fast charging, intelligent reuse of engine or inverter waste heat in winter, and real-time optimisation of energy use across driving and charging scenarios.

Looking ahead, thermal management in electric and hybrid vehicles sits at the intersection of several powerful industry trends and faces non-trivial constraints. Higher-voltage platforms, ultra-fast charging, high-energy-density batteries and the electrification of buses, trucks and dedicated fleet vehicles all raise the bar for precision and reliability in thermal control, creating room for innovation in heat exchanger design,

coolant and refrigerant systems, integrated modules and predictive control strategies. At the same time, these advances must be delivered within tight cost and packaging envelopes, under low-GWP refrigerant rules and long-life durability expectations. Ensuring consistent thermal behaviour across different cell formats, pack architectures and multi-powertrain platforms demands close collaboration between battery, powertrain, body and software teams. In this context, “Thermal Management in Electric and Hybrid Vehicles” is no longer a narrow engineering topic, but a strategic cross-discipline linking electrochemistry, mechanical and thermal hardware, embedded software and user experience across the entire electrified vehicle value chain.

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

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

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

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

Segmentation by Type:

Air Conditioning System

Power 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

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