

Global AI Chassis Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global AI Chassis market size was valued at US\$ 4754 million in 2025 and is forecast to a readjusted size of US\$ 18123 million by 2032 with a CAGR of 21.0% during review period.

AI Chassis is a vehicle motion control platform that integrates artificial intelligence, vehicle dynamics models, environmental and vehicle state perception, chassis domain controllers or central computing platforms, and execution systems such as brake-by-wire, steering-by-wire, intelligent suspension, and electric drive control. The system acquires vehicle state, road surface characteristics, and driving intentions through data from cameras, LiDAR, wheel speed, acceleration, yaw rate, suspension travel, and road cloud data. It generates control strategies using predictive control, data-driven algorithms, or artificial intelligence models and coordinates the vehicle's longitudinal, lateral, and vertical movements in real time.

The AI Chassis included in this report must possess an online perception, decision-making, and execution closed loop, and at least two execution domains?braking, steering, suspension, and drive?must be coordinated by the VMC, chassis domain controller, or central computing platform. Products with integrated XYZ three-dimensional control and six-degree-of-freedom (Pitch, Roll, Yaw, etc.) collaborative control capabilities are considered high-end AI digital chassis. AI virtual calibration, cloud-based fault diagnosis, general powertrain calibration, separately sold EHB, EPS, and air springs, as well as chips and autonomous driving computing platforms that do not directly participate in chassis closed-loop control, are not included in the core market. In 2025, global AI Chassis shipments are estimated at approximately 2.8 million sets, with an average price of approximately US\$1,650 per set and a gross margin of approximately 24%.

AI Chassis is becoming a new competitive foundation for software-defined vehicles. Electrification enables fast and accurate wheel-torque allocation, while brake-by-wire, steer-by-wire and active suspension are transforming chassis actuation from mechanically coupled systems into programmable resources. Centralized electrical and electronic architectures provide the computing capacity required for cross-domain data fusion and unified decision-making. Vehicles can therefore move beyond reacting passively to driver and road inputs and begin anticipating surface irregularities, friction changes, body motion and instability risks before coordinating braking force, drive torque, steering angle, damping force and ride height.

Initial demand is being led by premium battery-electric, plug-in hybrid and range-extended vehicles, followed by penetration into mainstream passenger-car price segments. Road-preview suspension, rear-wheel steering, torque vectoring, tire-failure stabilization, active rollover prevention, smooth braking and motion-sickness mitigation are evolving from isolated features into integrated vehicle-motion software packages. As onboard sensors, driver-assistance systems, navigation information and cloud-based road data become more deeply integrated, the AI Chassis will progress from fixed calibration toward a predictive, learning and continuously upgradeable vehicle-motion agent. OTA-delivered functionality is also expected to create new software and lifecycle-service revenue.

Commercialization remains constrained by functional safety, redundant architectures, deterministic real-time control and cost. Braking and steering are safety-critical systems, meaning AI models cannot replace deterministic low-level control, safety monitors or degradation strategies. Suppliers must establish fail-safe or fail-operational architectures covering sensors, controllers, communications, power supplies and actuators. Increasing in-house development by automakers, unclear software-liability boundaries, insufficient actuator-interface standardization and the cost of advanced active suspension and steer-by-wire will continue to limit near-term penetration. Competition will increasingly shift from individual component performance toward vehicle-dynamics models, cross-domain algorithms, data-loop capabilities and large-scale engineering validation.

This report is a detailed and comprehensive analysis for global AI Chassis market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and

product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global AI Chassis market size and forecasts, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global AI Chassis market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global AI Chassis market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global AI Chassis market shares of main players, shipments in revenue (\$ Million), sales quantity (K Sets), and ASP (US\$/Set), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for AI Chassis

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global AI Chassis market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Robert Bosch GmbH, ZF Friedrichshafen AG, AUMOVIO SE, HL Mando Corporation, Hyundai Mobis Co., Ltd., Astemo, Ltd., SAIC Motor Corporation Limited, Zhejiang Geely Holding Group Co., Ltd., BYD Company Limited, Great Wall Motor Company Limited, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

AI Chassis market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Braking Steering And Suspension Integration

Braking Steering Suspension And Drive Integration

Independent-Wheel Full-Actuation Integration

Integrated Skateboard Chassis

Others

Market segment by Control Architecture

Chassis Domain Centralized Control

Cross-Domain Central Control

Vehicle Central Computing Control

Others

Market segment by Motion Control Capability

XYZ Coordinated Motion Control

Six-Degree-of-Freedom Integrated Motion Control

Others

Market segment by Application

Premium Passenger Vehicle

Mainstream New-Energy Passenger Vehicle

Robotaxi And Autonomous Shuttle

Commercial And Special-Purpose Vehicle

Others

Major players covered

Robert Bosch GmbH

ZF Friedrichshafen AG

AUMOVIO SE

HL Mando Corporation

Hyundai Mobis Co., Ltd.

Astemo, Ltd.

SAIC Motor Corporation Limited

Zhejiang Geely Holding Group Co., Ltd.

BYD Company Limited

Great Wall Motor Company Limited

NIO Inc.

Shenzhen Yinwang Intelligent Technology Co., Ltd.

CATL Shanghai Intelligent Technology Co., Ltd.

BIBO Automotive Electronics Co., Ltd.

MatriX Driving MXD

Chery Automobile Co., Ltd.

Xiaomi EV Technology Co., Ltd.

Li Auto Inc.

Guangzhou Automobile Group Co., Ltd.

Chongqing Changan Automobile Co., Ltd.

XPeng Inc.

Dongfeng Motor Corporation

Anhui Jianghuai Automobile Group Corp., Ltd.

Bethel Automotive Safety Systems Co., Ltd.

Suzhou Orient Motion Intelligent Technology Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe AI Chassis product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of AI Chassis, with price, sales quantity, revenue, and global market share of AI Chassis from 2021 to 2026.

Chapter 3, the AI Chassis competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the AI Chassis breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and AI Chassis market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of AI Chassis.

Chapter 14 and 15, to describe AI Chassis sales channel, distributors, customers, research findings and conclusion.

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