

Global Automotive ABS and ESC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive ABS and ESC market size is expected to reach \$ 5545 million by 2032, rising at a market growth of -1.7% CAGR during the forecast period (2026-2032).

In 2024, global sales of automotive ABS and ESC systems reached approximately 80 million units, with an average price of less than US\$80 per unit. The Anti-lock Braking System (ABS) is an active automotive safety technology. Its core function is to electronically control the braking force during braking to prevent the wheels from completely locking due to excessive braking. This prevents the wheels from rolling and sliding, maintaining optimal friction between the wheels and the road surface. This maximizes wheel adhesion and achieves a balance between controlled steering and minimal braking distance.

The Electronic Stability Control (ESC) system is an upgraded version of ABS that combines the Traction Control System (TCS) and Yaw Moment Control (AYC). ESC monitors vehicle operating conditions in real time and adjusts braking force and engine torque as needed to change the vehicle's yaw moment, ensuring lateral stability and enhancing driving safety, comfort, and maneuverability.

Global braking systems are undergoing a rapid evolution from traditional mechanical braking to electronic and intelligent systems. In the passenger car market, traditional mechanical braking has been largely replaced by ABS and ESC systems. ESC, in particular, has seen penetration rates in major markets like Europe, the US, Japan, and China exceed 85%–95% since 2020, reaching saturation. At the same time, with the accelerating trend toward electrification and intelligent driving, EHB (Electro-Hydraulic Brake) technology is rapidly gaining popularity, particularly the more integrated One-Box solution. This has seen large-scale adoption in premium brands in Europe and the US

starting in 2021, and in emerging markets like China from 2022 to 2024. According to data from international market research firms, EHB systems will be installed in nearly 20 million new passenger cars worldwide by 2024, representing a penetration rate of nearly 30%. This penetration rate is projected to exceed 50% in rapidly growing electric vehicle sales regions like Europe and China. In the future, Two-Box will be gradually replaced by One-Box, with EHB becoming the core braking technology for electric and smart vehicles. In the medium- and heavy-duty commercial vehicle market, pneumatic braking systems remain the mainstream. Europe and the United States mandated ESC on select models as early as 2012, driving the upgrade from ABS to pneumatic ESC. Emerging markets such as China and India accelerated implementation after 2020. Despite these regulations driving rapid upgrades for key models, a significant inventory of pneumatic ABS systems remains in the market. In contrast, the application of EHB or EMB in medium- and heavy-duty commercial vehicles remains limited, with demonstration applications limited to new energy light trucks, urban buses, and enclosed environments such as ports, mining areas, and logistics parks. In the short term, medium- and heavy-duty commercial vehicles will continue to rely on pneumatic braking systems, making EHB unlikely to achieve widespread penetration. However, EMB (Electro-Mechanical Brake) is widely considered a disruptive technology in the medium to long term. Traditional brake system giants such as Bosch and ZF are attempting to enter the EMB market to maintain their leadership in the automotive braking sector. OEMs such as Tesla and BMW are also actively pursuing EMB applications to enhance product competitiveness and control their supply chain. Overall, hydraulic and pneumatic braking systems maintain a clear division of labor in global braking system applications. Hydraulic braking is primarily used in passenger cars and light commercial vehicles, where hydraulics offer a natural advantage, facilitating electronic and intelligent control. Pneumatic braking, on the other hand, is the dominant technology in medium- and heavy-duty commercial vehicles, and its technological evolution will continue to focus on EBS + ESC in the short term. From 2020 to 2025, the global braking system market will exhibit two parallel paths: the passenger car market will transition from ESC adoption to EHB (especially One-Box), while the medium- and heavy-duty commercial vehicle market will rely on regulatory upgrades driven by pneumatic systems. In the medium to long term, EMB is expected to become a common technology across the next generation of passenger cars and commercial vehicles. This industrialization will accelerate, especially with the trend toward autonomous driving and advanced intelligent chassis integration.

This report studies the global Automotive ABS and ESC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive ABS and ESC and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive ABS and ESC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive ABS and ESC total production and demand, 2021-2032, (K Units)

Global Automotive ABS and ESC total production value, 2021-2032, (USD Million)

Global Automotive ABS and ESC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive ABS and ESC consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive ABS and ESC domestic production, consumption, key domestic manufacturers and share

Global Automotive ABS and ESC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive ABS and ESC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive ABS and ESC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive ABS and ESC market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bosch, Continental, ZF, Aisin, HL Mando, Knorr-Bremse, Ruili Kormee Automotive Electronic, Trinova Auto Tech, Youfin Auto Electronic Control System, DIAS Automotive Electronic Systems, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive ABS and ESC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive ABS and ESC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive ABS and ESC Market, Segmentation by Type:

Hydraulic Type

Pneumatic Type

Global Automotive ABS and ESC Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

Bosch

Continental

ZF

Aisin

HL Mando

Knorr-Bremse

Ruili Kormee Automotive Electronic

Trinova Auto Tech

Youfin Auto Electronic Control System

DIAS Automotive Electronic Systems

BWI

Bethel Automotive Safety Systems

Global Technology

Zhejiang Asia-Pacific Mechanical & Electronic

Wanxiang Qianchao

DFMC

ZheJiang Vie Science & Technology

King-truck Electone

Key Questions Answered:

1. How big is the global Automotive ABS and ESC market?
2. What is the demand of the global Automotive ABS and ESC market?
3. What is the year over year growth of the global Automotive ABS and ESC market?
4. What is the production and production value of the global Automotive ABS and ESC market?
5. Who are the key producers in the global Automotive ABS and ESC market?
6. What are the growth factors driving the market demand?

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