

Global Automotive AI Digital Chassis Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive AI Digital Chassis market size is expected to reach \$ 18123 million by 2032, rising at a market growth of 21.0% CAGR during the forecast period (2026-2032).

Automotive AI Digital Chassis is a vehicle-level intelligent motion-control platform integrating artificial intelligence, vehicle-dynamics models, environmental and vehicle-state sensing, chassis domain or central computing, and electronically controlled actuators such as brake-by-wire, steer-by-wire, intelligent suspension and electric-drive control. The system processes data from cameras, LiDAR, wheel-speed sensors, inertial measurement units, yaw-rate sensors, suspension-travel sensors, and road and cloud data to identify vehicle states, road characteristics and driver intentions in real time. Model-predictive, data-driven or AI-based algorithms are then used to generate control strategies and coordinate longitudinal, lateral and vertical vehicle motion dynamically. For the purposes of this report, an Automotive AI Digital Chassis must provide an online sensing, decision-making and execution loop. A vehicle motion controller, chassis domain controller or central computing platform must coordinate at least two of the braking, steering, suspension and propulsion domains. Systems integrating longitudinal X-axis, lateral Y-axis and vertical Z-axis control, while optimizing pitch, roll and yaw within a unified six-degree-of-freedom framework, are classified as advanced Automotive AI Digital Chassis systems. Offline AI calibration, cloud-only diagnostics, conventional powertrain calibration, standalone EHB, EPS or air-spring products, and chips or autonomous-driving computing platforms that do not directly participate in real-time chassis closed-loop control are excluded from the core market. In 2025, global shipments of Automotive AI Digital Chassis 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%.

Automotive AI Digital Chassis is becoming a critical technological foundation for competition in software-defined vehicles. Vehicle electrification enables millisecond-level torque response and precise torque allocation, while brake-by-wire, steer-by-wire and active suspension are transforming chassis actuation from mechanically coupled systems into programmable electronic resources. Centralized electrical and electronic architectures further integrate powertrain, chassis, intelligent-driving and body-control data, allowing vehicles to evolve from passive command execution toward active road perception, vehicle-motion prediction and autonomous control optimization. By coordinating braking force, drive torque, steering angle, suspension damping and ride height, Automotive AI Digital Chassis can simultaneously improve active safety, ride comfort and handling performance.

Premium battery-electric, plug-in hybrid and range-extended vehicles will lead the initial commercialization of Automotive AI Digital Chassis, followed by gradual penetration into mainstream passenger-car segments. Road-preview suspension, rear-wheel steering, torque vectoring, tire-failure stabilization, active rollover prevention, smooth braking and motion-sickness mitigation are evolving from independent chassis functions into integrated vehicle-motion-control software packages. As vehicle-state data, advanced driver-assistance perception, navigation information and cloud-based road data become more deeply integrated, Automotive AI Digital Chassis will transition from fixed calibration toward predictive, learning-enabled and continuously upgradeable control. OTA feature activation, personalized driving modes and lifecycle software services are expected to generate additional commercial value.

Large-scale deployment of Automotive AI Digital Chassis nevertheless remains constrained by functional-safety requirements, redundant architectures, real-time determinism and system costs. Braking and steering are safety-critical systems, meaning that AI models cannot replace deterministic low-level control, safety supervision or fault-degradation mechanisms. Suppliers must establish fail-safe or fail-operational architectures covering sensors, controllers, communication networks, power supplies and actuators. Increasing in-house development by automakers, unresolved software-liability boundaries, limited standardization of actuator interfaces, and the relatively high cost of fully active suspension and steer-by-wire systems will continue to restrict near-term penetration. Future competition will increasingly shift from the performance of individual chassis components toward integrated vehicle-dynamics models, cross-domain control algorithms, closed-loop data capabilities, functional-safety systems and large-scale engineering validation.

This report studies the global Automotive AI Digital Chassis production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive AI Digital Chassis 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 AI Digital Chassis that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive AI Digital Chassis total production and demand, 2021-2032, (K Sets)

Global Automotive AI Digital Chassis total production value, 2021-2032, (USD Million)

Global Automotive AI Digital Chassis production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sets), (based on production site)

Global Automotive AI Digital Chassis consumption by region & country, CAGR, 2021-2032 & (K Sets)

U.S. VS China: Automotive AI Digital Chassis domestic production, consumption, key domestic manufacturers and share

Global Automotive AI Digital Chassis production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sets)

Global Automotive AI Digital Chassis production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

Global Automotive AI Digital Chassis production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

This report profiles key players in the global Automotive AI Digital Chassis 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive AI Digital Chassis market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sets) and average price (US\$/Set) 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 AI Digital Chassis Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive AI Digital Chassis Market, Segmentation by Type:

Braking Steering And Suspension Integration

Braking Steering Suspension And Drive Integration

Independent-Wheel Full-Actuation Integration

Integrated Skateboard Chassis

Others

Global Automotive AI Digital Chassis Market, Segmentation by Control Architecture:

Chassis Domain Centralized Control

Cross-Domain Central Control

Vehicle Central Computing Control

Others

Global Automotive AI Digital Chassis Market, Segmentation by Motion Control Capability:

XYZ Coordinated Motion Control

Six-Degree-of-Freedom Integrated Motion Control

Others

Global Automotive AI Digital Chassis Market, Segmentation by Application:

Premium Passenger Vehicle

Mainstream New-Energy Passenger Vehicle

Robotaxi And Autonomous Shuttle

Commercial And Special-Purpose Vehicle

Others

Companies Profiled:

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.

Key Questions Answered:

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

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