

Global Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor market size was valued at US\$ 10.88 million in 2025 and is forecast to a readjusted size of US\$ 152 million by 2032 with a CAGR of 34.2% during review period.

A steer by wire handwheel feedback motor is an automotive grade bidirectional motor installed inside the steering wheel side actuator of a steer by wire system. Its core function is to generate continuous, adjustable and reversible feedback torque at the steering wheel after the rigid mechanical connection between the steering wheel and the road wheel steering mechanism has been removed. Based on driver steering input, vehicle speed, road wheel angle, yaw state, estimated road load and chassis control commands, the motor produces self centering force, on center feel, damping feel, friction feel, road disturbance feedback, speed dependent steering effort and haptic warnings for driver assistance functions. The product mainly covers direct drive feedback motors, belt reduction feedback motors, gear reduction feedback motors and integrated reaction motor modules. It is typically combined with steering angle sensors, torque sensors, reduction mechanisms, electronic controllers, steering columns, bearings, housings and redundant power supply and communication units to form a steering wheel actuator. Its motor structure is mainly based on brushless direct current motors and permanent magnet synchronous motors, and the production process includes electromagnetic and thermal design, electrical steel lamination stamping, stator winding manufacturing, insulation treatment, permanent magnet assembly, rotor dynamic balancing, bearing and housing assembly, position detection, torque calibration and automotive reliability testing. Key specifications include continuous feedback torque, peak feedback torque, response time, control bandwidth, cogging torque, torque

ripple, rotational inertia, reverse clearance, noise and vibration, operating voltage, redundant winding structure, functional safety level and operating temperature. It is mainly used in passenger cars, commercial vehicles, autonomous vehicles, driverless shuttle vehicles and other intelligent vehicles equipped with mechanically decoupled steer by wire systems. The industry has a high growth rate mainly because the current market base is relatively small, while steer by wire technology is moving from the demonstration and validation stage into the mass production introduction stage, with new vehicle models and supplier projects being launched in a concentrated period. In 2025, the global average price of steer by wire handwheel feedback motors was approximately USD 110 to USD 180 per unit, while the average industry gross margin was approximately 30% to 40%.

The upstream supply chain of Steer-by-Wire Steering Feel Feedback Motors mainly consists of electrical steel, enameled copper wire, permanent magnet materials, bearings, shafts, engineering plastics, aluminum alloy housings, position sensors, power semiconductors, and automotive-grade connectors. The midstream segment is responsible for motor electromagnetic design, winding manufacturing, rotor assembly, dynamic balancing, torque calibration, hardware and software matching, functional safety design, and integration into steering wheel actuator systems. The downstream market includes passenger vehicles, commercial vehicles, autonomous vehicles, and autonomous shuttle platforms. The industry value is not primarily concentrated in basic motor assembly, but rather in low cogging torque design, rapid bidirectional response, precise torque control, redundant architectures, vehicle dynamics calibration, and long-term automotive-grade reliability. As motors, sensors, reduction mechanisms, and controllers become increasingly modularized, midstream companies are gradually shifting from supplying individual components toward providing steering feel actuator platforms and collaborative hardware-software development solutions.

The global supply landscape presents a competitive structure driven jointly by Europe, Japan, North America, and China. European and North American suppliers have accumulated strong capabilities in vehicle functional safety, chassis domain control, system integration, and global customer validation. Japanese companies maintain advantages in precision motors, bearings, steering mechanisms, and low-noise manufacturing technologies. Chinese companies are rapidly entering the market by leveraging the fast development pace of intelligent electric vehicles and increasing domestic vehicle project opportunities. Currently, supply is still mainly controlled by major steering system suppliers, while independent motor manufacturers rarely sell standardized steering feel feedback motors directly to customers. Recent business integrations, new product launches, and smart manufacturing investments are

accelerating collaboration between motor platforms, actuator platforms, and chassis software. However, the number of suppliers achieving large-scale and stable commercial production remains limited, and market concentration is expected to remain relatively high during the early industrialization stage.

Current application demand mainly comes from high-end intelligent electric vehicles, software-defined vehicles, and models equipped with advanced driver assistance functions. Adoption in traditional internal combustion engine vehicles, economy-class models, and commercial vehicles remains at the validation stage. Steering feel feedback motors not only reproduce traditional road feel but are increasingly becoming an execution platform for automakers to create differentiated steering characteristics. The same hardware platform can provide different steering modes, including comfort, sport, urban, and highway settings, through software calibration. Direct-drive structures help reduce mechanical clearance and friction while improving feedback purity, whereas geared-drive structures provide a better balance among size, torque output, and cost. Future products will continue evolving toward lower torque ripple, lower rotational inertia, higher response bandwidth, stronger redundancy capabilities, and compatibility with both 12 V and 48 V electrical platforms.

Regulatory and standard systems are gradually shifting from permitting technical validation of steer-by-wire systems toward establishing clearer requirements for safety, fault degradation mechanisms, and mass-production approval boundaries. China's new national standards for automotive steering systems implemented in July 2026 provide a clearer regulatory foundation for the commercialization of mechanically decoupled steering systems. Future market growth will continue to depend on regulatory coordination, redundant power architectures, system cost reduction, driver acceptance, and the number of mass-produced vehicle platforms. In the short term, steering feel feedback motors will not fully replace traditional electric power steering systems. However, with the introduction of next-generation electric vehicle platforms, retractable steering wheels, centralized chassis control, and autonomous driving functions, steering feel feedback motors are expected to gradually evolve from high-end vehicle-specific components into standardized and reusable core actuators for intelligent chassis systems.

Report Scope

This report is a detailed and comprehensive analysis for global Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Steer-by-Wire Handwheel Feedback Motor market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Steer-by-Wire Handwheel Feedback Motor market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global Steer-by-Wire Handwheel Feedback Motor market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 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 Steer-by-Wire Handwheel Feedback Motor

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 Steer-by-Wire Handwheel Feedback Motor 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 ZF Friedrichshafen AG, Nexteer Automotive Group Limited, JTEKT Corporation, Robert Bosch GmbH, HL Mando

Corporation, KYB Corporation, Beijing Jingwei Hirain Technologies Co., Inc., Shanghai Tongyu Automotive Technology Co., Ltd., Zhejiang Shibao Company Limited, etc.

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

Market Segmentation

Steer-by-Wire Handwheel Feedback Motor 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

Direct Drive

Belt Reduction Drive

Gear Reduction Drive

Others

Market segment by Nominal Voltage

12 V

24 V

48 V

Others

Market segment by Application

Passenger Cars

Light Commercial Vehicles

Medium and Heavy Commercial Vehicles

Special Purpose Vehicles

Others

Major players covered

ZF Friedrichshafen AG

Nexteer Automotive Group Limited

JTEKT Corporation

Robert Bosch GmbH

HL Mando Corporation

KYB Corporation

Beijing Jingwei Hirain Technologies Co., Inc.

Shanghai Tongyu Automotive Technology Co., Ltd.

Zhejiang Shibao Company Limited

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)

Chapter Outline

Chapter 1, to describe Steer-by-Wire Handwheel Feedback Motor product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Steer-by-Wire Handwheel Feedback Motor, with price, sales quantity, revenue, and global market share of Steer-by-Wire Handwheel Feedback Motor from 2021 to 2026.

Chapter 3, the Steer-by-Wire Handwheel Feedback Motor competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor.

Chapter 14 and 15, to describe Steer-by-Wire Handwheel Feedback Motor sales channel, distributors, customers, research findings and conclusion.

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