

Global AI Chassis Market Growth 2026-2032

<https://marketpublishers.com/r/G46BA8416F3CEN.html>

Date: October 2026

Pages: 147

Price: US\$ 3,660.00 (Single User License)

ID: G46BA8416F3CEN

Abstracts

The global AI Chassis market size is predicted to grow from US\$ 4520 million in 2025 to US\$ 18378 million in 2032; it is expected to grow at a CAGR of 22.3% from 2026 to 2032.

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.

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

This Insight Report provides a comprehensive analysis of the global AI Chassis landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Chassis portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Chassis market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Chassis 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 AI Chassis.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Chassis market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Braking Steering And Suspension Integration

Braking Steering Suspension And Drive Integration

Independent-Wheel Full-Actuation Integration

Integrated Skateboard Chassis

Others

Segmentation by Control Architecture:

Chassis Domain Centralized Control

Cross-Domain Central Control

Vehicle Central Computing Control

Others

Segmentation by Motion Control Capability:

XYZ Coordinated Motion Control

Six-Degree-of-Freedom Integrated Motion Control

Others

Segmentation by Application:

Premium Passenger Vehicle

Mainstream New-Energy Passenger Vehicle

Robotaxi And Autonomous Shuttle

Commercial And Special-Purpose Vehicle

Others

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 analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global AI Chassis market?

What factors are driving AI Chassis market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Chassis market opportunities vary by end market size?

How does AI Chassis break out by Type, by Application?

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