

Global Electronically Controlled Air Suspension Market Growth 2026-2032

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Abstracts

The global Electronically Controlled Air Suspension market size is predicted to grow from US\$ 5646 million in 2025 to US\$ 11082 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Electronically controlled air suspension (ECAS) is an intelligent vehicle chassis system that uses air springs or air strut modules as elastic elements and electronically regulates air pressure, ride height, spring stiffness, and in some architectures damping behavior through compressors, reservoirs, valve blocks, pneumatic lines, pressure sensors, height sensors, body acceleration sensors, and an electronic control unit. The system can automatically or semi-automatically maintain vehicle level, raise or lower ride height, compensate for load changes, improve entry and loading convenience, reduce aerodynamic drag at higher speeds, increase ground clearance in off-road modes, and improve ride comfort and handling stability. ECAS is used in premium passenger cars, electric SUVs, MPVs, pickups, luxury sedans, buses, heavy trucks, trailers, and specialty vehicles. It represents an important transition from passive mechanical suspension toward electronically controlled, intelligent, and software-defined chassis systems.

In 2025, the global production of electronically controlled air suspension systems is 7.4 million units, with an average price of US\$780 per unit and a gross profit margin of 24.5%.

Based on our research, electronically controlled air suspension is not merely an air spring market; it is a system-level intelligent chassis market combining air springs, air supply units, valve blocks, sensors, ECUs, control software, and vehicle calibration. Traditional air suspension mainly addresses load leveling, ride height, and comfort, while ECAS adds

electronic control of ride height, load compensation, spring stiffness, driving modes, and in some cases damping coordination. ZF's OptiRide ECAS integrates solenoid valves and pressure sensors into a SmartPneumaticActuator to reduce components and simplify OEM integration, while Vibracoustic's system-level solution integrates the ECU and shock absorber application software. This shows that competition is moving from component supply toward integrated system engineering and control-software capability.

From a supply perspective, the market consists of global system suppliers, air spring and damper specialists, commercial-vehicle ECAS suppliers, and rapidly growing Chinese intelligent-chassis

companies. AUMOVIO, ZF, Vibracoustic, thyssenkrupp Bilstein, Firestone Airide, and BWI Group have long-standing experience in premium passenger vehicles, commercial vehicles, or advanced suspension systems. Chinese suppliers such as Shanghai Baolong Automotive, Ningbo Tuopu Group, Anhui Zhongding Sealing Parts, KHA Automotive Technologies, and Tianrun Industry Technology are expanding from air springs and core components into air supply units, valve-pump assemblies, ECUs, sensors, and complete system solutions. Baolong's official product page lists air suspension reservoirs, integrated air strut modules, height sensors, suspension ECUs, air springs, distribution valves, and air supply systems, while KHA Automotive describes its electronically controlled suspension system as including air spring damper assemblies, controllers, pumps, height sensors, body acceleration sensors, air tanks, pipes, and wiring harnesses.

Demand growth is being driven by premiumization, electrification, and intelligent chassis adoption. In the past, air suspension was concentrated in luxury vehicles from brands such as Mercedes-Benz, BMW, Audi, Porsche, and Land Rover, and in trucks, buses, and trailers requiring load leveling and ride stability. In recent years, Chinese new-energy SUVs, MPVs, and premium sedans have used air suspension as a comfort, luxury, and smart-chassis feature, bringing ECAS into lower price bands than traditional European luxury vehicles. In commercial vehicles, the value proposition remains linked to loading and unloading convenience, load-dependent stability, chassis height control, and fleet operating efficiency. ZF's 2025 announcement of OptiRide ECAS series production for Hyundai commercial vehicles confirms the continuing relevance of commercial-vehicle ECAS, while Chinese suppliers' mass production of closed air-supply systems and air spring modules indicates rapid localization in the passenger-vehicle segment.

From a technology perspective, the industry is moving from open systems, single-chamber air springs, and basic height control toward closed-loop air supply, dual-

chamber or multi-chamber air springs, integrated valve-pump modules, chassis domain control, road-preview control, and integration with semi-active or active damping. Continental's CAirS uses a closed system with a pressure reservoir and is positioned for functions ranging from simple level control to integrated spring-rate and damping control. AUMOVIO's electronic suspension systems automatically adjust damping, suspension levels, and vehicle height. Zhongding's smart suspension portfolio covers air springs, air supply units, air tanks, and magnetorheological dampers, showing how ECAS is converging with CDC, magnetorheological damping, active roll control, and software-defined chassis architectures. The main constraints are high system cost, long validation cycles, maintenance cost, packaging complexity, and substitution by lower-cost semi-active damping systems in mid-range vehicles.

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

This Insight Report provides a comprehensive analysis of the global Electronically Controlled Air Suspension 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 Electronically Controlled Air Suspension portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Electronically Controlled Air Suspension market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Electronically Controlled Air Suspension 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 Electronically Controlled Air Suspension.

This report presents a comprehensive overview, market shares, and growth opportunities of Electronically Controlled Air Suspension market by product type,

application, key manufacturers and key regions and countries.

Segmentation by Type:

Open ECAS System

Closed ECAS System

Segmentation by Air Spring Structure:

Diaphragm Air Spring

Bag Air Spring

Segmentation by Control Dimensions:

Height Control System

Semi-Active Suspension System

Fully Active Suspension System

Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

Special Vehicles

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.

ZF Friedrichshafen

AUMOVIO

Vibracoustic

thyssenkrupp Bilstein

Firestone Airide

BWI Group

Marelli

Parker Hannifin

SAF-Holland

Hendrickson

VB-Airsuspension

Dunlop Systems and Components

Arnott

Air Lift Company

Shanghai Baolong Automotive

Ningbo Tuopu Group

Anhui Zhongding Sealing Parts

KH Automotive Technologies

Tianrun Industry Technology

Shanghai Koman Vehicle Component Systems

Zhejiang Asia-Pacific Mechanical & Electronic

Zhejiang Wanan Technology

AMK Automotive

Hitachi Astemo

HL Mando

Hyundai Mobis

KYB

NHK Spring

Trelleborg

Stemco

Link Manufacturing

Key Questions Addressed in this Report

What is the 10-year outlook for the global Electronically Controlled Air Suspension market?

What factors are driving Electronically Controlled Air Suspension market growth,

globally and by region?

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

How do Electronically Controlled Air Suspension market opportunities vary by end market size?

How does Electronically Controlled Air Suspension break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Electronically Controlled Air Suspension Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Electronically Controlled Air Suspension by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Electronically Controlled Air Suspension by Country/Region, 2021, 2025 & 2032

2.2 Electronically Controlled Air Suspension Segment by Type

- 2.2.1 Open ECAS System
- 2.2.2 Closed ECAS System
- 2.2.3 Electronically Controlled Air Suspension Sales by Type
 - 2.2.3.1 Global Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Electronically Controlled Air Suspension Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Electronically Controlled Air Suspension Sale Price by Type (2021-2026)

2.3 Electronically Controlled Air Suspension Segment by Air Spring Structure

- 2.3.1 Diaphragm Air Spring
- 2.3.2 Bag Air Spring
- 2.3.3 Electronically Controlled Air Suspension Sales by Air Spring Structure
 - 2.3.3.1 Global Electronically Controlled Air Suspension Sales Market Share by Air Spring Structure (2021-2026)
 - 2.3.3.2 Global Electronically Controlled Air Suspension Revenue and Market Share by Air Spring Structure (2021-2026)

2.3.3.3 Global Electronically Controlled Air Suspension Sale Price by Air Spring Structure (2021-2026)

2.4 Electronically Controlled Air Suspension Segment by Control Dimensions

2.4.1 Height Control System

2.4.2 Semi-Active Suspension System

2.4.3 Fully Active Suspension System

2.4.4 Electronically Controlled Air Suspension Sales by Control Dimensions

2.4.4.1 Global Electronically Controlled Air Suspension Sales Market Share by Control Dimensions (2021-2026)

2.4.4.2 Global Electronically Controlled Air Suspension Revenue and Market Share by Control Dimensions (2021-2026)

2.4.4.3 Global Electronically Controlled Air Suspension Sale Price by Control Dimensions (2021-2026)

2.5 Electronically Controlled Air Suspension Segment by Application

2.5.1 Passenger Vehicles

2.5.2 Commercial Vehicles

2.5.3 Special Vehicles

2.5.4 Electronically Controlled Air Suspension Sales by Application

2.5.4.1 Global Electronically Controlled Air Suspension Sale Market Share by Application (2021-2026)

2.5.4.2 Global Electronically Controlled Air Suspension Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Electronically Controlled Air Suspension Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Electronically Controlled Air Suspension Breakdown Data by Company

3.1.1 Global Electronically Controlled Air Suspension Annual Sales by Company (2021-2026)

3.1.2 Global Electronically Controlled Air Suspension Sales Market Share by Company (2021-2026)

3.2 Global Electronically Controlled Air Suspension Annual Revenue by Company (2021-2026)

3.2.1 Global Electronically Controlled Air Suspension Revenue by Company (2021-2026)

3.2.2 Global Electronically Controlled Air Suspension Revenue Market Share by Company (2021-2026)

3.3 Global Electronically Controlled Air Suspension Sale Price by Company

3.4 Key Manufacturers Electronically Controlled Air Suspension Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Electronically Controlled Air Suspension Product Location Distribution

3.4.2 Players Electronically Controlled Air Suspension Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ELECTRONICALLY CONTROLLED AIR SUSPENSION BY GEOGRAPHIC REGION

4.1 World Historic Electronically Controlled Air Suspension Market Size by Geographic Region (2021-2026)

4.1.1 Global Electronically Controlled Air Suspension Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Electronically Controlled Air Suspension Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Electronically Controlled Air Suspension Market Size by Country/Region (2021-2026)

4.2.1 Global Electronically Controlled Air Suspension Annual Sales by Country/Region (2021-2026)

4.2.2 Global Electronically Controlled Air Suspension Annual Revenue by Country/Region (2021-2026)

4.3 Americas Electronically Controlled Air Suspension Sales Growth

4.4 APAC Electronically Controlled Air Suspension Sales Growth

4.5 Europe Electronically Controlled Air Suspension Sales Growth

4.6 Middle East & Africa Electronically Controlled Air Suspension Sales Growth

5 AMERICAS

5.1 Americas Electronically Controlled Air Suspension Sales by Country

5.1.1 Americas Electronically Controlled Air Suspension Sales by Country (2021-2026)

5.1.2 Americas Electronically Controlled Air Suspension Revenue by Country (2021-2026)

5.2 Americas Electronically Controlled Air Suspension Sales by Type (2021-2026)

5.3 Americas Electronically Controlled Air Suspension Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Electronically Controlled Air Suspension Sales by Region

6.1.1 APAC Electronically Controlled Air Suspension Sales by Region (2021-2026)

6.1.2 APAC Electronically Controlled Air Suspension Revenue by Region (2021-2026)

6.2 APAC Electronically Controlled Air Suspension Sales by Type (2021-2026)

6.3 APAC Electronically Controlled Air Suspension Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Electronically Controlled Air Suspension by Country

7.1.1 Europe Electronically Controlled Air Suspension Sales by Country (2021-2026)

7.1.2 Europe Electronically Controlled Air Suspension Revenue by Country
(2021-2026)

7.2 Europe Electronically Controlled Air Suspension Sales by Type (2021-2026)

7.3 Europe Electronically Controlled Air Suspension Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Electronically Controlled Air Suspension by Country

8.1.1 Middle East & Africa Electronically Controlled Air Suspension Sales by Country
(2021-2026)

8.1.2 Middle East & Africa Electronically Controlled Air Suspension Revenue by Country (2021-2026)

8.2 Middle East & Africa Electronically Controlled Air Suspension Sales by Type (2021-2026)

8.3 Middle East & Africa Electronically Controlled Air Suspension Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Electronically Controlled Air Suspension

10.3 Manufacturing Process Analysis of Electronically Controlled Air Suspension

10.4 Industry Chain Structure of Electronically Controlled Air Suspension

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Electronically Controlled Air Suspension Distributors

11.3 Electronically Controlled Air Suspension Customer

12 WORLD FORECAST REVIEW FOR ELECTRONICALLY CONTROLLED AIR SUSPENSION BY GEOGRAPHIC REGION

12.1 Global Electronically Controlled Air Suspension Market Size Forecast by Region

12.1.1 Global Electronically Controlled Air Suspension Forecast by Region (2027-2032)

12.1.2 Global Electronically Controlled Air Suspension Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Electronically Controlled Air Suspension Forecast by Type (2027-2032)

12.7 Global Electronically Controlled Air Suspension Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 ZF Friedrichshafen

13.1.1 ZF Friedrichshafen Company Information

13.1.2 ZF Friedrichshafen Electronically Controlled Air Suspension Product Portfolios and Specifications

13.1.3 ZF Friedrichshafen Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 ZF Friedrichshafen Main Business Overview

13.1.5 ZF Friedrichshafen Latest Developments

13.2 AUMOVIO

13.2.1 AUMOVIO Company Information

13.2.2 AUMOVIO Electronically Controlled Air Suspension Product Portfolios and Specifications

13.2.3 AUMOVIO Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 AUMOVIO Main Business Overview

13.2.5 AUMOVIO Latest Developments

13.3 Vibracoustic

13.3.1 Vibracoustic Company Information

13.3.2 Vibracoustic Electronically Controlled Air Suspension Product Portfolios and Specifications

13.3.3 Vibracoustic Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Vibracoustic Main Business Overview

13.3.5 Vibracoustic Latest Developments

13.4 thyssenkrupp Bilstein

13.4.1 thyssenkrupp Bilstein Company Information

13.4.2 thyssenkrupp Bilstein Electronically Controlled Air Suspension Product

Portfolios and Specifications

13.4.3 thyssenkrupp Bilstein Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 thyssenkrupp Bilstein Main Business Overview

13.4.5 thyssenkrupp Bilstein Latest Developments

13.5 Firestone Airide

13.5.1 Firestone Airide Company Information

13.5.2 Firestone Airide Electronically Controlled Air Suspension Product Portfolios and Specifications

13.5.3 Firestone Airide Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Firestone Airide Main Business Overview

13.5.5 Firestone Airide Latest Developments

13.6 BWI Group

13.6.1 BWI Group Company Information

13.6.2 BWI Group Electronically Controlled Air Suspension Product Portfolios and Specifications

13.6.3 BWI Group Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 BWI Group Main Business Overview

13.6.5 BWI Group Latest Developments

13.7 Marelli

13.7.1 Marelli Company Information

13.7.2 Marelli Electronically Controlled Air Suspension Product Portfolios and Specifications

13.7.3 Marelli Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Marelli Main Business Overview

13.7.5 Marelli Latest Developments

13.8 Parker Hannifin

13.8.1 Parker Hannifin Company Information

13.8.2 Parker Hannifin Electronically Controlled Air Suspension Product Portfolios and Specifications

13.8.3 Parker Hannifin Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Parker Hannifin Main Business Overview

13.8.5 Parker Hannifin Latest Developments

13.9 SAF-Holland

13.9.1 SAF-Holland Company Information

13.9.2 SAF-Holland Electronically Controlled Air Suspension Product Portfolios and Specifications

13.9.3 SAF-Holland Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 SAF-Holland Main Business Overview

13.9.5 SAF-Holland Latest Developments

13.10 Hendrickson

13.10.1 Hendrickson Company Information

13.10.2 Hendrickson Electronically Controlled Air Suspension Product Portfolios and Specifications

13.10.3 Hendrickson Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Hendrickson Main Business Overview

13.10.5 Hendrickson Latest Developments

13.11 VB-Airsuspension

13.11.1 VB-Airsuspension Company Information

13.11.2 VB-Airsuspension Electronically Controlled Air Suspension Product Portfolios and Specifications

13.11.3 VB-Airsuspension Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 VB-Airsuspension Main Business Overview

13.11.5 VB-Airsuspension Latest Developments

13.12 Dunlop Systems and Components

13.12.1 Dunlop Systems and Components Company Information

13.12.2 Dunlop Systems and Components Electronically Controlled Air Suspension Product Portfolios and Specifications

13.12.3 Dunlop Systems and Components Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Dunlop Systems and Components Main Business Overview

13.12.5 Dunlop Systems and Components Latest Developments

13.13 Arnott

13.13.1 Arnott Company Information

13.13.2 Arnott Electronically Controlled Air Suspension Product Portfolios and Specifications

13.13.3 Arnott Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Arnott Main Business Overview

13.13.5 Arnott Latest Developments

13.14 Air Lift Company

- 13.14.1 Air Lift Company Company Information
- 13.14.2 Air Lift Company Electronically Controlled Air Suspension Product Portfolios and Specifications
- 13.14.3 Air Lift Company Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.14.4 Air Lift Company Main Business Overview
- 13.14.5 Air Lift Company Latest Developments
- 13.15 Shanghai Baolong Automotive
 - 13.15.1 Shanghai Baolong Automotive Company Information
 - 13.15.2 Shanghai Baolong Automotive Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.15.3 Shanghai Baolong Automotive Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Shanghai Baolong Automotive Main Business Overview
 - 13.15.5 Shanghai Baolong Automotive Latest Developments
- 13.16 Ningbo Tuopu Group
 - 13.16.1 Ningbo Tuopu Group Company Information
 - 13.16.2 Ningbo Tuopu Group Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.16.3 Ningbo Tuopu Group Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Ningbo Tuopu Group Main Business Overview
 - 13.16.5 Ningbo Tuopu Group Latest Developments
- 13.17 Anhui Zhongding Sealing Parts
 - 13.17.1 Anhui Zhongding Sealing Parts Company Information
 - 13.17.2 Anhui Zhongding Sealing Parts Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.17.3 Anhui Zhongding Sealing Parts Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Anhui Zhongding Sealing Parts Main Business Overview
 - 13.17.5 Anhui Zhongding Sealing Parts Latest Developments
- 13.18 KH Automotive Technologies
 - 13.18.1 KH Automotive Technologies Company Information
 - 13.18.2 KH Automotive Technologies Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.18.3 KH Automotive Technologies Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 KH Automotive Technologies Main Business Overview
 - 13.18.5 KH Automotive Technologies Latest Developments

13.19 Tianrun Industry Technology

13.19.1 Tianrun Industry Technology Company Information

13.19.2 Tianrun Industry Technology Electronically Controlled Air Suspension Product Portfolios and Specifications

13.19.3 Tianrun Industry Technology Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Tianrun Industry Technology Main Business Overview

13.19.5 Tianrun Industry Technology Latest Developments

13.20 Shanghai Koman Vehicle Component Systems

13.20.1 Shanghai Koman Vehicle Component Systems Company Information

13.20.2 Shanghai Koman Vehicle Component Systems Electronically Controlled Air Suspension Product Portfolios and Specifications

13.20.3 Shanghai Koman Vehicle Component Systems Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Shanghai Koman Vehicle Component Systems Main Business Overview

13.20.5 Shanghai Koman Vehicle Component Systems Latest Developments

13.21 Zhejiang Asia-Pacific Mechanical & Electronic

13.21.1 Zhejiang Asia-Pacific Mechanical & Electronic Company Information

13.21.2 Zhejiang Asia-Pacific Mechanical & Electronic Electronically Controlled Air Suspension Product Portfolios and Specifications

13.21.3 Zhejiang Asia-Pacific Mechanical & Electronic Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Zhejiang Asia-Pacific Mechanical & Electronic Main Business Overview

13.21.5 Zhejiang Asia-Pacific Mechanical & Electronic Latest Developments

13.22 Zhejiang Wanan Technology

13.22.1 Zhejiang Wanan Technology Company Information

13.22.2 Zhejiang Wanan Technology Electronically Controlled Air Suspension Product Portfolios and Specifications

13.22.3 Zhejiang Wanan Technology Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Zhejiang Wanan Technology Main Business Overview

13.22.5 Zhejiang Wanan Technology Latest Developments

13.23 AMK Automotive

13.23.1 AMK Automotive Company Information

13.23.2 AMK Automotive Electronically Controlled Air Suspension Product Portfolios and Specifications

13.23.3 AMK Automotive Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 AMK Automotive Main Business Overview

- 13.23.5 AMK Automotive Latest Developments
- 13.24 Hitachi Astemo
 - 13.24.1 Hitachi Astemo Company Information
 - 13.24.2 Hitachi Astemo Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.24.3 Hitachi Astemo Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.24.4 Hitachi Astemo Main Business Overview
 - 13.24.5 Hitachi Astemo Latest Developments
- 13.25 HL Mando
 - 13.25.1 HL Mando Company Information
 - 13.25.2 HL Mando Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.25.3 HL Mando Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.25.4 HL Mando Main Business Overview
 - 13.25.5 HL Mando Latest Developments
- 13.26 Hyundai Mobis
 - 13.26.1 Hyundai Mobis Company Information
 - 13.26.2 Hyundai Mobis Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.26.3 Hyundai Mobis Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.26.4 Hyundai Mobis Main Business Overview
 - 13.26.5 Hyundai Mobis Latest Developments
- 13.27 KYB
 - 13.27.1 KYB Company Information
 - 13.27.2 KYB Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.27.3 KYB Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 KYB Main Business Overview
 - 13.27.5 KYB Latest Developments
- 13.28 NHK Spring
 - 13.28.1 NHK Spring Company Information
 - 13.28.2 NHK Spring Electronically Controlled Air Suspension Product Portfolios and Specifications
 - 13.28.3 NHK Spring Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.28.4 NHK Spring Main Business Overview

13.28.5 NHK Spring Latest Developments

13.29 Trelleborg

13.29.1 Trelleborg Company Information

13.29.2 Trelleborg Electronically Controlled Air Suspension Product Portfolios and Specifications

13.29.3 Trelleborg Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.29.4 Trelleborg Main Business Overview

13.29.5 Trelleborg Latest Developments

13.30 Stemco

13.30.1 Stemco Company Information

13.30.2 Stemco Electronically Controlled Air Suspension Product Portfolios and Specifications

13.30.3 Stemco Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.30.4 Stemco Main Business Overview

13.30.5 Stemco Latest Developments

13.31 Link Manufacturing

13.31.1 Link Manufacturing Company Information

13.31.2 Link Manufacturing Electronically Controlled Air Suspension Product Portfolios and Specifications

13.31.3 Link Manufacturing Electronically Controlled Air Suspension Sales, Revenue, Price and Gross Margin (2021-2026)

13.31.4 Link Manufacturing Main Business Overview

13.31.5 Link Manufacturing Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Electronically Controlled Air Suspension Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Electronically Controlled Air Suspension Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Open ECAS System

Table 4. Major Players of Closed ECAS System

Table 5. Global Electronically Controlled Air Suspension Sales by Type (2021-2026) & (K Units)

Table 6. Global Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)

Table 7. Global Electronically Controlled Air Suspension Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Electronically Controlled Air Suspension Revenue Market Share by Type (2021-2026)

Table 9. Global Electronically Controlled Air Suspension Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Diaphragm Air Spring

Table 11. Major Players of Bag Air Spring

Table 12. Global Electronically Controlled Air Suspension Sales by Air Spring Structure (2021-2026) & (K Units)

Table 13. Global Electronically Controlled Air Suspension Sales Market Share by Air Spring Structure (2021-2026)

Table 14. Global Electronically Controlled Air Suspension Revenue by Air Spring Structure (2021-2026) & (\$ million)

Table 15. Global Electronically Controlled Air Suspension Revenue Market Share by Air Spring Structure (2021-2026)

Table 16. Global Electronically Controlled Air Suspension Sale Price by Air Spring Structure (2021-2026) & (US\$/Unit)

Table 17. Major Players of Height Control System

Table 18. Major Players of Semi-Active Suspension System

Table 19. Major Players of Fully Active Suspension System

Table 20. Global Electronically Controlled Air Suspension Sales by Control Dimensions (2021-2026) & (K Units)

Table 21. Global Electronically Controlled Air Suspension Sales Market Share by Control Dimensions (2021-2026)

Table 22. Global Electronically Controlled Air Suspension Revenue by Control Dimensions (2021-2026) & (\$ million)

Table 23. Global Electronically Controlled Air Suspension Revenue Market Share by Control Dimensions (2021-2026)

Table 24. Global Electronically Controlled Air Suspension Sale Price by Control Dimensions (2021-2026) & (US\$/Unit)

Table 25. Global Electronically Controlled Air Suspension Sale by Application (2021-2026) & (K Units)

Table 26. Global Electronically Controlled Air Suspension Sale Market Share by Application (2021-2026)

Table 27. Global Electronically Controlled Air Suspension Revenue by Application (2021-2026) & (\$ million)

Table 28. Global Electronically Controlled Air Suspension Revenue Market Share by Application (2021-2026)

Table 29. Global Electronically Controlled Air Suspension Sale Price by Application (2021-2026) & (US\$/Unit)

Table 30. Global Electronically Controlled Air Suspension Sales by Company (2021-2026) & (K Units)

Table 31. Global Electronically Controlled Air Suspension Sales Market Share by Company (2021-2026)

Table 32. Global Electronically Controlled Air Suspension Revenue by Company (2021-2026) & (\$ millions)

Table 33. Global Electronically Controlled Air Suspension Revenue Market Share by Company (2021-2026)

Table 34. Global Electronically Controlled Air Suspension Sale Price by Company (2021-2026) & (US\$/Unit)

Table 35. Key Manufacturers Electronically Controlled Air Suspension Producing Area Distribution and Sales Area

Table 36. Players Electronically Controlled Air Suspension Products Offered

Table 37. Electronically Controlled Air Suspension Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 38. New Products and Potential Entrants

Table 39. Market M&A Activity & Strategy

Table 40. Global Electronically Controlled Air Suspension Sales by Geographic Region (2021-2026) & (K Units)

Table 41. Global Electronically Controlled Air Suspension Sales Market Share Geographic Region (2021-2026)

Table 42. Global Electronically Controlled Air Suspension Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 43. Global Electronically Controlled Air Suspension Revenue Market Share by Geographic Region (2021-2026)

Table 44. Global Electronically Controlled Air Suspension Sales by Country/Region (2021-2026) & (K Units)

Table 45. Global Electronically Controlled Air Suspension Sales Market Share by Country/Region (2021-2026)

Table 46. Global Electronically Controlled Air Suspension Revenue by Country/Region (2021-2026) & (\$ millions)

Table 47. Global Electronically Controlled Air Suspension Revenue Market Share by Country/Region (2021-2026)

Table 48. Americas Electronically Controlled Air Suspension Sales by Country (2021-2026) & (K Units)

Table 49. Americas Electronically Controlled Air Suspension Sales Market Share by Country (2021-2026)

Table 50. Americas Electronically Controlled Air Suspension Revenue by Country (2021-2026) & (\$ millions)

Table 51. Americas Electronically Controlled Air Suspension Sales by Type (2021-2026) & (K Units)

Table 52. Americas Electronically Controlled Air Suspension Sales by Application (2021-2026) & (K Units)

Table 53. APAC Electronically Controlled Air Suspension Sales by Region (2021-2026) & (K Units)

Table 54. APAC Electronically Controlled Air Suspension Sales Market Share by Region (2021-2026)

Table 55. APAC Electronically Controlled Air Suspension Revenue by Region (2021-2026) & (\$ millions)

Table 56. APAC Electronically Controlled Air Suspension Sales by Type (2021-2026) & (K Units)

Table 57. APAC Electronically Controlled Air Suspension Sales by Application (2021-2026) & (K Units)

Table 58. Europe Electronically Controlled Air Suspension Sales by Country (2021-2026) & (K Units)

Table 59. Europe Electronically Controlled Air Suspension Revenue by Country (2021-2026) & (\$ millions)

Table 60. Europe Electronically Controlled Air Suspension Sales by Type (2021-2026) & (K Units)

Table 61. Europe Electronically Controlled Air Suspension Sales by Application (2021-2026) & (K Units)

Table 62. Middle East & Africa Electronically Controlled Air Suspension Sales by

Country (2021-2026) & (K Units)

Table 63. Middle East & Africa Electronically Controlled Air Suspension Revenue
Market Share by Country (2021-2026)

Table 64. Middle East & Africa Electronically Controlled Air Suspension Sales by Type
(2021-2026) & (K Units)

Table 65. Middle East & Africa Electronically Controlled Air Suspension Sales by
Application (2021-2026) & (K Units)

Table 66. Key Market Drivers & Growth Opportunities of Electronically Controlled Air
Suspension

Table 67. Key Market Challenges & Risks of Electronically Controlled Air Suspension

Table 68. Key Industry Trends of Electronically Controlled Air Suspension

Table 69. Electronically Controlled Air Suspension Raw Material

Table 70. Key Suppliers of Raw Materials

Table 71. Electronically Controlled Air Suspension Distributors List

Table 72. Electronically Controlled Air Suspension Customer List

Table 73. Global Electronically Controlled Air Suspension Sales Forecast by Region
(2027-2032) & (K Units)

Table 74. Global Electronically Controlled Air Suspension Revenue Forecast by Region
(2027-2032) & (\$ millions)

Table 75. Americas Electronically Controlled Air Suspension Sales Forecast by Country
(2027-2032) & (K Units)

Table 76. Americas Electronically Controlled Air Suspension Annual Revenue Forecast
by Country (2027-2032) & (\$ millions)

Table 77. APAC Electronically Controlled Air Suspension Sales Forecast by Region
(2027-2032) & (K Units)

Table 78. APAC Electronically Controlled Air Suspension Annual Revenue Forecast by
Region (2027-2032) & (\$ millions)

Table 79. Europe Electronically Controlled Air Suspension Sales Forecast by Country
(2027-2032) & (K Units)

Table 80. Europe Electronically Controlled Air Suspension Revenue Forecast by
Country (2027-2032) & (\$ millions)

Table 81. Middle East & Africa Electronically Controlled Air Suspension Sales Forecast
by Country (2027-2032) & (K Units)

Table 82. Middle East & Africa Electronically Controlled Air Suspension Revenue
Forecast by Country (2027-2032) & (\$ millions)

Table 83. Global Electronically Controlled Air Suspension Sales Forecast by Type
(2027-2032) & (K Units)

Table 84. Global Electronically Controlled Air Suspension Revenue Forecast by Type
(2027-2032) & (\$ millions)

Table 85. Global Electronically Controlled Air Suspension Sales Forecast by Application (2027-2032) & (K Units)

Table 86. Global Electronically Controlled Air Suspension Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 87. ZF Friedrichshafen Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 88. ZF Friedrichshafen Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 89. ZF Friedrichshafen Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 90. ZF Friedrichshafen Main Business

Table 91. ZF Friedrichshafen Latest Developments

Table 92. AUMOVIO Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 93. AUMOVIO Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 94. AUMOVIO Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 95. AUMOVIO Main Business

Table 96. AUMOVIO Latest Developments

Table 97. Vibracoustic Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 98. Vibracoustic Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 99. Vibracoustic Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 100. Vibracoustic Main Business

Table 101. Vibracoustic Latest Developments

Table 102. thyssenkrupp Bilstein Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 103. thyssenkrupp Bilstein Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 104. thyssenkrupp Bilstein Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. thyssenkrupp Bilstein Main Business

Table 106. thyssenkrupp Bilstein Latest Developments

Table 107. Firestone Airide Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 108. Firestone Airide Electronically Controlled Air Suspension Product Portfolios

and Specifications

Table 109. Firestone Airide Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 110. Firestone Airide Main Business

Table 111. Firestone Airide Latest Developments

Table 112. BWI Group Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 113. BWI Group Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 114. BWI Group Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. BWI Group Main Business

Table 116. BWI Group Latest Developments

Table 117. Marelli Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 118. Marelli Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 119. Marelli Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. Marelli Main Business

Table 121. Marelli Latest Developments

Table 122. Parker Hannifin Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 123. Parker Hannifin Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 124. Parker Hannifin Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. Parker Hannifin Main Business

Table 126. Parker Hannifin Latest Developments

Table 127. SAF-Holland Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 128. SAF-Holland Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 129. SAF-Holland Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. SAF-Holland Main Business

Table 131. SAF-Holland Latest Developments

Table 132. Hendrickson Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 133. Hendrickson Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 134. Hendrickson Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Hendrickson Main Business

Table 136. Hendrickson Latest Developments

Table 137. VB-Airsuspension Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 138. VB-Airsuspension Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 139. VB-Airsuspension Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. VB-Airsuspension Main Business

Table 141. VB-Airsuspension Latest Developments

Table 142. Dunlop Systems and Components Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 143. Dunlop Systems and Components Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 144. Dunlop Systems and Components Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 145. Dunlop Systems and Components Main Business

Table 146. Dunlop Systems and Components Latest Developments

Table 147. Arnott Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 148. Arnott Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 149. Arnott Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Arnott Main Business

Table 151. Arnott Latest Developments

Table 152. Air Lift Company Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 153. Air Lift Company Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 154. Air Lift Company Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Air Lift Company Main Business

Table 156. Air Lift Company Latest Developments

Table 157. Shanghai Baolong Automotive Basic Information, Electronically Controlled

Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 158. Shanghai Baolong Automotive Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 159. Shanghai Baolong Automotive Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Shanghai Baolong Automotive Main Business

Table 161. Shanghai Baolong Automotive Latest Developments

Table 162. Ningbo Tuopu Group Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 163. Ningbo Tuopu Group Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 164. Ningbo Tuopu Group Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 165. Ningbo Tuopu Group Main Business

Table 166. Ningbo Tuopu Group Latest Developments

Table 167. Anhui Zhongding Sealing Parts Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 168. Anhui Zhongding Sealing Parts Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 169. Anhui Zhongding Sealing Parts Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 170. Anhui Zhongding Sealing Parts Main Business

Table 171. Anhui Zhongding Sealing Parts Latest Developments

Table 172. KH Automotive Technologies Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 173. KH Automotive Technologies Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 174. KH Automotive Technologies Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 175. KH Automotive Technologies Main Business

Table 176. KH Automotive Technologies Latest Developments

Table 177. Tianrun Industry Technology Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 178. Tianrun Industry Technology Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 179. Tianrun Industry Technology Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 180. Tianrun Industry Technology Main Business

Table 181. Tianrun Industry Technology Latest Developments

Table 182. Shanghai Koman Vehicle Component Systems Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 183. Shanghai Koman Vehicle Component Systems Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 184. Shanghai Koman Vehicle Component Systems Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 185. Shanghai Koman Vehicle Component Systems Main Business

Table 186. Shanghai Koman Vehicle Component Systems Latest Developments

Table 187. Zhejiang Asia-Pacific Mechanical & Electronic Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 188. Zhejiang Asia-Pacific Mechanical & Electronic Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 189. Zhejiang Asia-Pacific Mechanical & Electronic Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 190. Zhejiang Asia-Pacific Mechanical & Electronic Main Business

Table 191. Zhejiang Asia-Pacific Mechanical & Electronic Latest Developments

Table 192. Zhejiang Wanan Technology Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 193. Zhejiang Wanan Technology Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 194. Zhejiang Wanan Technology Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 195. Zhejiang Wanan Technology Main Business

Table 196. Zhejiang Wanan Technology Latest Developments

Table 197. AMK Automotive Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 198. AMK Automotive Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 199. AMK Automotive Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 200. AMK Automotive Main Business

Table 201. AMK Automotive Latest Developments

Table 202. Hitachi Astemo Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 203. Hitachi Astemo Electronically Controlled Air Suspension Product Portfolios

and Specifications

Table 204. Hitachi Astemo Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 205. Hitachi Astemo Main Business

Table 206. Hitachi Astemo Latest Developments

Table 207. HL Mando Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 208. HL Mando Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 209. HL Mando Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 210. HL Mando Main Business

Table 211. HL Mando Latest Developments

Table 212. Hyundai Mobis Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 213. Hyundai Mobis Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 214. Hyundai Mobis Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 215. Hyundai Mobis Main Business

Table 216. Hyundai Mobis Latest Developments

Table 217. KYB Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 218. KYB Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 219. KYB Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 220. KYB Main Business

Table 221. KYB Latest Developments

Table 222. NHK Spring Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 223. NHK Spring Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 224. NHK Spring Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 225. NHK Spring Main Business

Table 226. NHK Spring Latest Developments

Table 227. Trelleborg Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 228. Trelleborg Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 229. Trelleborg Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 230. Trelleborg Main Business

Table 231. Trelleborg Latest Developments

Table 232. Stemco Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 233. Stemco Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 234. Stemco Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 235. Stemco Main Business

Table 236. Stemco Latest Developments

Table 237. Link Manufacturing Basic Information, Electronically Controlled Air Suspension Manufacturing Base, Sales Area and Its Competitors

Table 238. Link Manufacturing Electronically Controlled Air Suspension Product Portfolios and Specifications

Table 239. Link Manufacturing Electronically Controlled Air Suspension Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 240. Link Manufacturing Main Business

Table 241. Link Manufacturing Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Electronically Controlled Air Suspension
- Figure 2. Electronically Controlled Air Suspension Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Electronically Controlled Air Suspension Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Electronically Controlled Air Suspension Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Electronically Controlled Air Suspension Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Electronically Controlled Air Suspension Sales Market Share by Country/Region (2025)
- Figure 10. Electronically Controlled Air Suspension Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Open ECAS System
- Figure 12. Product Picture of Closed ECAS System
- Figure 13. Global Electronically Controlled Air Suspension Sales Market Share by Type in 2026
- Figure 14. Global Electronically Controlled Air Suspension Revenue Market Share by Type (2021-2026)
- Figure 15. Product Picture of Diaphragm Air Spring
- Figure 16. Product Picture of Bag Air Spring
- Figure 17. Global Electronically Controlled Air Suspension Sales Market Share by Air Spring Structure in 2026
- Figure 18. Global Electronically Controlled Air Suspension Revenue Market Share by Air Spring Structure (2021-2026)
- Figure 19. Product Picture of Height Control System
- Figure 20. Product Picture of Semi-Active Suspension System
- Figure 21. Product Picture of Fully Active Suspension System
- Figure 22. Global Electronically Controlled Air Suspension Sales Market Share by Control Dimensions in 2026
- Figure 23. Global Electronically Controlled Air Suspension Revenue Market Share by Control Dimensions (2021-2026)
- Figure 24. Electronically Controlled Air Suspension Consumed in Passenger Vehicles

- Figure 25. Global Electronically Controlled Air Suspension Market: Passenger Vehicles (2021-2026) & (K Units)
- Figure 26. Electronically Controlled Air Suspension Consumed in Commercial Vehicles
- Figure 27. Global Electronically Controlled Air Suspension Market: Commercial Vehicles (2021-2026) & (K Units)
- Figure 28. Electronically Controlled Air Suspension Consumed in Special Vehicles
- Figure 29. Global Electronically Controlled Air Suspension Market: Special Vehicles (2021-2026) & (K Units)
- Figure 30. Global Electronically Controlled Air Suspension Sale Market Share by Application (2025)
- Figure 31. Global Electronically Controlled Air Suspension Revenue Market Share by Application in 2025
- Figure 32. Electronically Controlled Air Suspension Sales by Company in 2025 (K Units)
- Figure 33. Global Electronically Controlled Air Suspension Sales Market Share by Company in 2025
- Figure 34. Electronically Controlled Air Suspension Revenue by Company in 2025 (\$ millions)
- Figure 35. Global Electronically Controlled Air Suspension Revenue Market Share by Company in 2025
- Figure 36. Global Electronically Controlled Air Suspension Sales Market Share by Geographic Region (2021-2026)
- Figure 37. Global Electronically Controlled Air Suspension Revenue Market Share by Geographic Region in 2025
- Figure 38. Americas Electronically Controlled Air Suspension Sales 2021-2026 (K Units)
- Figure 39. Americas Electronically Controlled Air Suspension Revenue 2021-2026 (\$ millions)
- Figure 40. APAC Electronically Controlled Air Suspension Sales 2021-2026 (K Units)
- Figure 41. APAC Electronically Controlled Air Suspension Revenue 2021-2026 (\$ millions)
- Figure 42. Europe Electronically Controlled Air Suspension Sales 2021-2026 (K Units)
- Figure 43. Europe Electronically Controlled Air Suspension Revenue 2021-2026 (\$ millions)
- Figure 44. Middle East & Africa Electronically Controlled Air Suspension Sales 2021-2026 (K Units)
- Figure 45. Middle East & Africa Electronically Controlled Air Suspension Revenue 2021-2026 (\$ millions)
- Figure 46. Americas Electronically Controlled Air Suspension Sales Market Share by Country in 2025
- Figure 47. Americas Electronically Controlled Air Suspension Revenue Market Share by

Country (2021-2026)

Figure 48. Americas Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)

Figure 49. Americas Electronically Controlled Air Suspension Sales Market Share by Application (2021-2026)

Figure 50. United States Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 51. Canada Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 52. Mexico Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 53. Brazil Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 54. APAC Electronically Controlled Air Suspension Sales Market Share by Region in 2025

Figure 55. APAC Electronically Controlled Air Suspension Revenue Market Share by Region (2021-2026)

Figure 56. APAC Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)

Figure 57. APAC Electronically Controlled Air Suspension Sales Market Share by Application (2021-2026)

Figure 58. China Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 59. Japan Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 60. South Korea Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 61. Southeast Asia Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 62. India Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 63. Australia Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 64. China Taiwan Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 65. Europe Electronically Controlled Air Suspension Sales Market Share by Country in 2025

Figure 66. Europe Electronically Controlled Air Suspension Revenue Market Share by Country (2021-2026)

Figure 67. Europe Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)

Figure 68. Europe Electronically Controlled Air Suspension Sales Market Share by Application (2021-2026)

Figure 69. Germany Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 70. France Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 71. UK Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 72. Italy Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 73. Russia Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 74. Middle East & Africa Electronically Controlled Air Suspension Sales Market Share by Country (2021-2026)

Figure 75. Middle East & Africa Electronically Controlled Air Suspension Sales Market Share by Type (2021-2026)

Figure 76. Middle East & Africa Electronically Controlled Air Suspension Sales Market Share by Application (2021-2026)

Figure 77. Egypt Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 78. South Africa Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 79. Israel Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 80. Turkey Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 81. GCC Countries Electronically Controlled Air Suspension Revenue Growth 2021-2026 (\$ millions)

Figure 82. Manufacturing Cost Structure Analysis of Electronically Controlled Air Suspension in 2026

Figure 83. Manufacturing Process Analysis of Electronically Controlled Air Suspension

Figure 84. Industry Chain Structure of Electronically Controlled Air Suspension

Figure 85. Channels of Distribution

Figure 86. Global Electronically Controlled Air Suspension Sales Market Forecast by Region (2027-2032)

Figure 87. Global Electronically Controlled Air Suspension Revenue Market Share Forecast by Region (2027-2032)

Figure 88. Global Electronically Controlled Air Suspension Sales Market Share Forecast

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