

Global Indirect TPMS Market Growth 2026-2032

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Abstracts

The global Indirect TPMS market size is predicted to grow from US\$ 1226 million in 2025 to US\$ 1698 million in 2032; it is expected to grow at a CAGR of 5.1% from 2026 to 2032.

An Indirect Tire Pressure Monitoring System (TPMS) is a type of vehicle safety system designed to monitor tire pressure indirectly through the vehicle's existing sensors and electronic systems. Unlike direct TPMS, which uses sensors inside each tire to measure and transmit pressure data, indirect TPMS relies on data from other vehicle systems to infer tire pressure.

Upstream inputs include automotive-grade MEMS pressure dies, MCUs and RF transceivers (commonly 315/433 MHz), antennas and passives, primary batteries, valve-stem hardware, seals, injection-molded housings, and calibration/diagnostic software.

In 2025, global Indirect Tire Pressure Monitoring System (TPMS) production reached approximately 50 million sets, with an average global market price is \$25 per set.

Indirect TPMS is a tire-pressure monitoring approach that does not place pressure sensors inside the tires. Instead, it estimates under-inflation by analyzing signals already available on the vehicle—most commonly ABS wheel-speed sensors—comparing relative wheel rotational speeds to detect anomalies. The underlying physics is straightforward: when a tire loses pressure, its effective rolling radius decreases slightly, so that wheel rotates faster at the same vehicle speed; the system interprets that relative speed deviation and triggers a low-pressure warning. NHTSA's rulemaking documentation describes indirect systems clearly as those that measure wheel speed (or other factors besides tire pressure) and notes that ABS-based solutions are an indirect measurement system.

The market is moving from basic warning capability to experience quality and controllable delivery. First, algorithms are evolving beyond simple wheel-speed variance checks toward more robust signal processing and multi-condition adaptation, improving stability across road-surface variation, tire wear differences, and more complex leak patterns. Second, indirect TPMS is often positioned as a cost- and architecture-friendly pathway?no in-tire sensors or batteries?supporting easier parts logistics and potentially lower lifecycle service burden; however, that advantage comes with a stronger dependence on correct calibration and vehicle-specific baseline setting to keep warnings credible. Consumer and safety guidance materials commonly explain indirect TPMS in these terms and emphasize that it infers pressure loss rather than measuring pressure directly.

Opportunity is strongest where platform scalability and service simplicity matter: cost-sensitive vehicle programs, regions and segments where minimizing wheel-hardware variants is valuable, and OEM architectures that can continuously refine performance through software updates and chassis-domain integration. In aftersales and daily use, one of the most practical differentiators is process discipline: after tire rotation, replacement, or pressure adjustments, the system typically requires a calibration step to reset the baseline. OEM service materials and technical job aids routinely highlight this requirement, because incorrect baseline setting can drive false warnings or missed alerts?making calibration a core part of quality handover.

Regionally, North America's compliance expectations place strong emphasis on reliable low-pressure detection, pushing indirect systems toward more rigorous validation of algorithms and calibration procedures. Europe and UNECE markets increasingly frame TPMS as the ability to evaluate tire pressure or pressure variation, and broader coverage supports a mix of indirect and direct strategies depending on vehicle segment and cost-positioning.

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

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

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

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

Segmentation by Type:

ABS/ESC ECU

Domain Compute

Segmentation by Sales Channel:

OEM

Aftermarket

Segmentation by Vehicle:

Internal Combustion Engines

New Energy Vehicles

Segmentation by Application:

Passenger Car

Commercial Vehicle

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.

Sensata Technologies

Baolong Automotive

Sysgration Ltd.

Continental

Pacific Industrial

Sate Auto Electronic

Lianchuang Automotive Electronics

CUB ELECPARTS INC

Steelmate

Orange Electronic

Bendix Corporation

Hamaton Automotive

NIRA Dynamics

Autel Automotive Intelligence

Key Questions Addressed in this Report

What is the 10-year outlook for the global Indirect TPMS market?

What factors are driving Indirect TPMS market growth, globally and by region?

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

How do Indirect TPMS market opportunities vary by end market size?

How does Indirect TPMS break out by Type, by Application?

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