

Global Steer-by-Wire Handwheel Feedback Motor Market Growth 2026-2032

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Abstracts

The global Steer-by-Wire Handwheel Feedback Motor market size is predicted to grow from US\$ 10.34 million in 2025 to US\$ 159 million in 2032; it is expected to grow at a CAGR of 36.3% from 2026 to 2032.

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

LP Information, Inc. (LPI) ' newest research report, the "Steer-by-Wire Handwheel Feedback Motor Industry Forecast" looks at past sales and reviews total world Steer-by-Wire Handwheel Feedback Motor sales in 2025, providing a comprehensive analysis by region and market sector of projected Steer-by-Wire Handwheel Feedback Motor sales for 2026 through 2032. With Steer-by-Wire Handwheel Feedback Motor sales broken

down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Steer-by-Wire Handwheel Feedback Motor industry.

This Insight Report provides a comprehensive analysis of the global Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Steer-by-Wire Handwheel Feedback Motor market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Steer-by-Wire Handwheel Feedback Motor 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 Steer-by-Wire Handwheel Feedback Motor.

This report presents a comprehensive overview, market shares, and growth opportunities of Steer-by-Wire Handwheel Feedback Motor market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Direct Drive

Belt Reduction Drive

Gear Reduction Drive

Others

Segmentation by Nominal Voltage:

12 V

24 V

48 V

Others

Segmentation by Application:

Passenger Cars

Light Commercial Vehicles

Medium and Heavy Commercial Vehicles

Special Purpose Vehicles

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.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Steer-by-Wire Handwheel Feedback Motor market?

What factors are driving Steer-by-Wire Handwheel Feedback Motor market growth, globally and by region?

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

How do Steer-by-Wire Handwheel Feedback Motor market opportunities vary by end market size?

How does Steer-by-Wire Handwheel Feedback Motor break out by Type, by Application?

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