

Air Suspension Market by Component (Air Spring, Shocker, Compressor, ECU, Tank, Solenoid Valve, Height & Pressure Sensor), Technology (Electronic, Non-Electronic), Cab Suspension, Vehicle Type (ICE & Electric), Aftermarket & Region - Global Forecast to 2027

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Abstracts

The air suspension market is expected to grow from USD 17.8 billion in 2022 and is projected to reach USD 21.8 billion in 2027, at a CAGR of 4.2% during the forecast period. The increasing sales of trucks & buses globally would primarily drive the air suspension market. Additionally, an increase in the adoption of air suspension systems in luxury passenger cars - SUVs, sedans, and EVs would also drive the air suspension systems market.

The global demand for commercial vehicles has shown significant growth in recent years. According to OICA statistics, commercial vehicle sales have increased from 21.7 million units in 2020 to 23.1 million units in 2021, at a CAGR of 6.1%. The growth can be attributed to increasing infrastructure spending, rising import-export trade, and growing e-commerce activities. The improved lifestyle and economic status have led to a change in consumer preferences across the globe. The demand for premium vehicles has been continuously growing in developed and developing countries with the increasing disposable income, improving infrastructure, rising brand awareness, and growing competition among OEMs to offer improved features. This has led to an increase in sales of premium and medium-range vehicles at a global level. Developed regions such as Europe, North America, and a few Asian countries such as Japan and South Korea are the key markets for premium vehicles. China and India are expected to offer a huge opportunity for premium and luxury vehicles in the coming years. All these

factors are expected to drive the demand for air suspension systems in the coming years.

Electricronically controlled air suspension systems to grow at the fastest pace.

North America leads the Electronically Controlled Air Suspension (ECAS) because of the higher adoption rate for technologically advanced systems. Audi A8, Mercedes S-Class, Porsche Cayenne, Land Rover Discovery, and Volkswagen Touareg are some passenger vehicle models with electronically controlled systems as a standard fitment in their selected trims. The adoption rate in Europe for Trucks and buses stood at nearly 40-50% and 55-60%, respectively, in 2022. Volvo, Daimler AG, Scania, and MAN offer electronically controlled systems in trucks and buses for the European market. ECAS fitted trailers reach the optimal height faster when the valves open to fill air in the bellows as needed. ECAS automatically adjusts the height of the trailer making it more efficient to work with. This system is data-driven and is suited to uneven roads as it will be unresponsive to sudden bumps in the road and thus will reduced compressed air wastage. These advantages offered by ECAS has made them attractive to the semi trailer and bus coaches OEMs making ECAS grow at a significant pace.

Heavy duty trucks lead the air suspension aftermarket, with air bellows holding the largest share in terms of value.

The matured demand for air suspension in Europe and North America for heavy vehicles would fuel the demand for air suspension components in the aftermarket. Upcoming smart city projects, rising infrastructural spending, and diversification of global companies in the Asia Pacific are expected to boost the demand for trucks and buses in that region. This is expected to boost the Asia Pacific air suspension system components aftermarket in the coming years. . North America is anticipated to lead the air bellows aftermarket as it has a higher number of trucks with air suspension technology on the road, owing to the early adoption of the system in this region. The average number of shock absorber bushes fitted in trucks and buses is 15–20 units per shock absorber. Hence, the demand for bushes in the aftermarket is higher.

North America is the second largest market for the air suspension market

Demand for better ride quality in rugged and long-haul environments in North America and Europe is expected to drive the air suspension market in these regions. The transportation industry in the North American region is well developed due to the strong presence of commercial vehicle OEMs and good road infrastructure. The US trucking

industry has a wide regional network, making it the largest air suspension market. Canada has a high demand for light trucks and pickups with increasing demand for commercial vehicles, making it the fastest growing country in the region.

With increasing sales of EVs, SUVs, luxury vehicles, and light trucks, the passenger cars segment is witnessing a surge in demand. Higher paying capacity allows customers to demand superior ride quality. This makes the adoption of air suspension faster in this segment. The trucks segment is expected to hold a significant share due to the country's well-established transportation network.

Due to many light duty applications, there is a trend in increasing demand for EVs and SUVs in Canada. These applications require its customers to drive the vehicles for longer distances prompting them to demand a better ride experience. This has increased the availability of air suspension in LCVs in the country. Thus due to similar factors, passenger cars will be the fastest-growing segment in the country.

The breakup of primary respondents

By Company: Tier 2 – 21%, Tier 1 – 69%, Others -10%

By Designation: C level executives - 60%, Director Level - 30%, Others – 10%

By Region: Europe - 48%, Asia Pacific - 19%, North America - 33%

The automotive suspension industry is dominated by global players and comprises several regional players, including ZF Friedrichshafen AG (Germany), Continental AG (Germany), ThyssenKrupp AG (Germany), Meritor Inc. (US), SAF Holland (Germany). The study includes an in-depth competitive analysis of these key players in the automotive suspension market with their company profiles, MnM view of the top five companies, recent developments, and key market strategies.

Research Coverage

The study's primary objective is to define, describe, and forecast the air suspension market by value and volume. The study segments the air suspension market by technology (electronically controlled and non-electronically controlled), component (air springs, shock absorber, compressor, electronic control unit, air reservoir, height sensors, solenoid valves, and pressure sensors), vehicle type (light-duty vehicles,

trucks, and buses), cabin air suspension by vehicle type (rigid trucks and semi-trailers), electric and hybrid HDVs (trucks and buses) and region (North America, Europe, Asia Pacific, and RoW). The study also covers the aftermarket by component (air bellows and shock absorber bushes). It analyzes the opportunities offered by various market segments to the stakeholders. It tracks and analyzes competitive developments such as market ranking analysis, expansions, joint ventures, acquisitions, and other activities carried out by key industry participants.

Key Benefits of Buying the Report:

The report will help the market leaders with the information on the closest approximations of the revenue numbers for the air suspension market and the sub-segments. The study will also help the key players identify the highest potential region and design their product portfolio per market requirements. Detailed research on passenger cars, LCV, and HCV suspension systems is expected to help manufacturers to understand the potential market for these vehicle types and which technologies are predominant in the respective vehicle types. This report includes various analyses like supply chain, average selling price, patent, revenue shift, case study, and porter's analysis. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS AND EXCLUSIONS

TABLE 1 INCLUSIONS AND EXCLUSIONS FOR AIR SUSPENSION MARKET

1.4 MARKET SCOPE

1.4.1 MARKETS COVERED

FIGURE 1 AIR SUSPENSION MARKET SEGMENTATION

1.4.2 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 PACKAGE SIZE

1.7 LIMITATIONS

1.8 STAKEHOLDERS

1.9 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 AIR SUSPENSION MARKET: RESEARCH DESIGN

FIGURE 3 RESEARCH DESIGN MODEL

2.1.1 SECONDARY DATA

2.1.1.1 List of key secondary sources to estimate vehicle production

2.1.1.2 List of key secondary sources to estimate air suspension market sizing

2.1.1.3 Key data from secondary sources

2.1.2 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.1.2.1 Sampling techniques and data collection methods

2.1.2.2 Primary participants

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

FIGURE 5 BOTTOM-UP APPROACH: AIR SUSPENSION MARKET, BY VEHICLE TYPE

2.3 MARKET BREAKDOWN AND DATA TRIANGULATION

FIGURE 6 DATA TRIANGULATION

2.4 ASSUMPTIONS

3 EXECUTIVE SUMMARY

3.1 REPORT SUMMARY

FIGURE 7 REPORT SUMMARY

FIGURE 8 AIR SUSPENSION MARKET, BY REGION, 2022 VS. 2027 (USD MILLION)

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN AIR SUSPENSION MARKET

FIGURE 9 DEMAND FOR LUXURY AND COMFORT FEATURES AND GROWING PREMIUM VEHICLE SALES BRINGS ATTRACTIVE OPPORTUNITIES IN AIR SUSPENSION MARKET

4.2 AIR SUSPENSION MARKET, BY TECHNOLOGY

FIGURE 10 ELECTRONICALLY CONTROLLED SEGMENT TO BE FASTEST-GROWING MARKET, 2022 VS. 2027 (USD MILLION)

4.3 AIR SUSPENSION MARKET, BY VEHICLE TYPE

FIGURE 11 TRUCKS SEGMENT EXPECTED TO LEAD AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

4.4 AIR SUSPENSION MARKET, BY COMPONENT

FIGURE 12 AIR SPRINGS TO HOLD LARGEST MARKET SHARE, 2022 VS. 2027 (USD MILLION)

4.5 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE

FIGURE 13 SEMI TRAILERS TO BE LARGEST MARKET DURING FORECAST PERIOD, 2022 VS. 2027 (USD MILLION)

4.6 AIR SUSPENSION AFTERMARKET, BY COMPONENT

FIGURE 14 AIR BELLOWS TO BE LARGEST MARKET IN AFTERMARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)

4.7 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE AND REGION

FIGURE 15 ELECTRIC AND HYBRID BUSES TO SHOWCASE LARGEST DEMAND DURING FORECAST PERIOD (USD MILLION)

4.8 AIR SUSPENSION MARKET, BY REGION

FIGURE 16 ASIA PACIFIC TO HAVE LARGEST SHARE DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 17 AIR SUSPENSION MARKET DYNAMICS**5.2.1 DRIVERS**

5.2.1.1 Rising global commercial vehicle sales

FIGURE 18 COMMERCIAL VEHICLE SALES, BY REGION, 2019–2021 ('000 UNITS)

5.2.1.2 Growing demand for premium and luxury vehicles

FIGURE 19 LUXURY PASSENGER CARS PRODUCTION, 2018–2021 (MILLION UNITS)**TABLE 2 KEY OEMS PREMIUM CARS SALES, 2020 VS. 2021 (UNITS)****TABLE 3 KEY PASSENGER CAR MODELS EMPLOYED WITH AIR SUSPENSIONS AND THEIR PRODUCTION, 2021 (UNITS)****5.2.2 RESTRAINTS**

5.2.2.1 High development and adoption costs

TABLE 4 AVERAGE COST OF DIFFERENT SUSPENSION TECHNOLOGIES, BY VEHICLE TYPE, 2021**5.2.3 OPPORTUNITIES**

5.2.3.1 Increasing demand for lightweight air suspension systems

TABLE 5 WEIGHT REDUCTION TARGETS FOR SYSTEMS OF LIGHT-DUTY INTERNAL COMBUSTION ENGINE VEHICLES (2020–2050) IN US

5.2.3.2 Increasing aftermarket demand for air suspensions and related components

FIGURE 20 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)**5.2.4 CHALLENGES**

5.2.4.1 Presence of local suppliers

5.3 AIR SUSPENSION MARKET SCENARIO**FIGURE 21 AIR SUSPENSION MARKET SCENARIO, 2018–2027 (USD MILLION)****5.3.1 MOST LIKELY SCENARIO****TABLE 6 AIR SUSPENSION MARKET (REALISTIC SCENARIO), BY REGION, 2018–2021 (USD MILLION)****TABLE 7 AIR SUSPENSION MARKET (REALISTIC SCENARIO), BY REGION, 2022–2027 (USD MILLION)****5.3.2 LOW IMPACT SCENARIO****TABLE 8 AIR SUSPENSION MARKET (LOW IMPACT SCENARIO), BY REGION, 2018–2021 (USD MILLION)****TABLE 9 AIR SUSPENSION MARKET (LOW IMPACT SCENARIO), BY REGION, 2022–2027 (USD MILLION)****5.3.3 HIGH IMPACT SCENARIO****TABLE 10 AIR SUSPENSION MARKET (HIGH IMPACT SCENARIO), BY REGION, 2018–2021 (USD MILLION)****TABLE 11 AIR SUSPENSION MARKET (HIGH IMPACT SCENARIO), BY REGION,**

2022–2027 (USD MILLION)

5.4 PORTER'S FIVE FORCES ANALYSIS

FIGURE 22 PORTER'S FIVE FORCES ANALYSIS: PRESENCE OF ESTABLISHED GLOBAL PLAYERS INCREASES COMPETITION

TABLE 12 PORTER'S FIVE FORCES ANALYSIS

5.4.1 THREAT OF SUBSTITUTES

5.4.2 THREAT OF NEW ENTRANTS

5.4.3 BARGAINING POWER OF BUYERS

5.4.4 BARGAINING POWER OF SUPPLIERS

5.4.5 INTENSITY OF COMPETITIVE RIVALRY

5.5 AIR SUSPENSION MARKET ECOSYSTEM

TABLE 13 AIR SUSPENSION MARKET: ROLE OF COMPANIES IN ECOSYSTEM

5.6 SUPPLY CHAIN ANALYSIS

5.6.1 GLOBAL SUPPLIERS

FIGURE 23 SUPPLY CHAIN ANALYSIS: AIR SUSPENSION MARKET

5.7 PRICING ANALYSIS

5.7.1 LIGHT DUTY VEHICLES

TABLE 14 AVERAGE REGIONAL PRICE TREND: LIGHT-DUTY VEHICLE AIR SUSPENSION (USD/UNIT), 2021

5.7.2 TRUCKS

TABLE 15 AVERAGE REGIONAL PRICE TREND: TRUCK AIR SUSPENSION (USD/UNIT), 2021

5.7.3 PRICING ANALYSIS, BY COMPONENTS

TABLE 16 AVERAGE REGIONAL PRICE TREND: AIR SUSPENSION COMPONENT OE COSTS PER VEHICLE, 2021

5.8 CUSTOMER BUYING BEHAVIOR

5.8.1 BUYING CRITERIA

FIGURE 24 KEY BUYING CRITERIA FOR ON-HIGHWAY VEHICLE APPLICATIONS

TABLE 17 KEY BUYING CRITERIA FOR ON-HIGHWAY VEHICLE APPLICATIONS

TABLE 18 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR ON-HIGHWAY VEHICLE APPLICATIONS (%)

5.9 PATENT ANALYSIS

TABLE 19 APPLICATIONS AND PATENTS GRANTED, 2019–2022

5.10 CASE STUDY ANALYSIS

5.10.1 HENDRICKSON TRAILER COMMERCIAL VEHICLE SYSTEMS

5.10.2 LINK AND VOLVO COLLABORATED ON TRAILER COMMERCIAL VEHICLE SYSTEMS

5.11 TRADE ANALYSIS

5.11.1 AIR SUSPENSION SYSTEMS AND PARTS IMPORT DATA, BY COUNTRY,

2021 (USD)

TABLE 20 IMPORT TRADE DATA, BY COUNTRY, 2021

5.11.2 AIR SUSPENSION SYSTEMS AND PARTS EXPORT DATA, BY COUNTRY, 2021 (USD)

TABLE 21 EXPORT TRADE DATA, BY COUNTRY, 2021

5.12 REGULATORY ANALYSIS

TABLE 22 SAFETY REGULATIONS, BY COUNTRY/REGION

5.13 KEY CONFERENCES AND EVENTS IN 2022–2023

TABLE 23 AIR SUSPENSION MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

6 RECOMMENDATIONS BY MARKET SAND MARKETS

6.1 ASIA PACIFIC TO LEAD AIR SUSPENSION MARKET

6.2 GROWING DEMAND FOR ELECTRONICALLY CONTROLLED AIR SUSPENSION TO BE KEY FOCUS AREA

6.3 CONCLUSION

7 AIR SUSPENSION MARKET, BY VEHICLE TYPE

7.1 INTRODUCTION

7.1.1 RESEARCH METHODOLOGY

7.1.2 ASSUMPTIONS

7.1.3 INDUSTRY INSIGHTS

FIGURE 25 AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 24 AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 25 AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 26 AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 27 AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

7.2 PASSENGER CARS

7.2.1 INCREASING DEMAND FOR IMPROVED RIDE QUALITY TO DRIVE SEGMENT

TABLE 28 PASSENGER CARS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 29 PASSENGER CARS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 30 PASSENGER CARS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 31 PASSENGER CARS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3 LIGHT COMMERCIAL VEHICLES

7.3.1 NORTH AMERICA TO LEAD SEGMENT

TABLE 32 LCVS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 33 LCVS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 34 LCVS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 35 LCVS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

7.4 TRUCKS

7.4.1 ASIA PACIFIC TO LEAD TRUCKS AIR SUSPENSION MARKET

TABLE 36 TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 37 TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 38 TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 39 TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

7.5 BUSES

7.5.1 ASIA PACIFIC TO ACQUIRE LARGEST MARKET SHARE

TABLE 40 BUSES: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 41 BUSES: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 42 BUSES: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 43 BUSES: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

8 AIR SUSPENSION MARKET, BY TECHNOLOGY

8.1 INTRODUCTION

8.1.1 RESEARCH METHODOLOGY

8.1.2 ASSUMPTIONS

8.1.3 INDUSTRY INSIGHTS

FIGURE 26 AIR SUSPENSION MARKET, BY TECHNOLOGY, 2022–2027 (USD MILLION)

TABLE 44 AIR SUSPENSION MARKET, BY TECHNOLOGY, 2018–2021 (THOUSAND UNITS)

TABLE 45 AIR SUSPENSION MARKET, BY TECHNOLOGY, 2022–2027 (THOUSAND UNITS)

TABLE 46 AIR SUSPENSION MARKET, BY TECHNOLOGY, 2018–2021 (USD MILLION)

TABLE 47 AIR SUSPENSION MARKET, BY TECHNOLOGY, 2022–2027 (USD MILLION)

8.2 ELECTRONICALLY CONTROLLED

8.2.1 EUROPE TO BE LARGEST MARKET FOR ELECTRONICALLY CONTROLLED AIR SUSPENSION SYSTEMS

TABLE 48 ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 49 ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 50 ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 51 ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

8.3 NON-ELECTRONICALLY CONTROLLED

8.3.1 LOW COSTS AND MAINTENANCE TO CREATE POTENTIAL SEGMENT

TABLE 52 NON- ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 53 NON- ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 54 NON- ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 55 NON- ELECTRONICALLY CONTROLLED AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

9 AIR SUSPENSION OE MARKET, BY COMPONENT

9.1 INTRODUCTION

9.1.1 RESEARCH METHODOLOGY

9.1.2 ASSUMPTIONS

9.1.3 INDUSTRY INSIGHTS

FIGURE 27 AIR SUSPENSION MARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)

TABLE 56 AIR SUSPENSION OE MARKET, BY COMPONENT, 2018–2021 (THOUSAND UNITS)

TABLE 57 AIR SUSPENSION OE MARKET, BY COMPONENT, 2022–2027 (THOUSAND UNITS)

TABLE 58 AIR SUSPENSION OE MARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 59 AIR SUSPENSION OE MARKET, BY COMPONENT, 2022–2027 (USD MILLION)

9.2 AIR SPRINGS

9.2.1 GROWTH WITH INCREASING DEMAND FOR AIR SUSPENSIONS

TABLE 60 AIR SPRINGS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 61 AIR SPRINGS MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 62 AIR SPRINGS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 63 AIR SPRINGS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.3 SHOCK ABSORBERS

9.3.1 ASIA PACIFIC LEADS SEGMENT

TABLE 64 SHOCK ABSORBERS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 65 SHOCK ABSORBERS MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 66 SHOCK ABSORBERS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 67 SHOCK ABSORBERS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.4 AIR COMPRESSORS

9.4.1 INCREASING DEMAND FOR IN LIGHT DUTY VEHICLES TO AID SEGMENT GROWTH

TABLE 68 AIR COMPRESSORS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 69 AIR COMPRESSORS MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 70 AIR COMPRESSORS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 71 AIR COMPRESSORS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.5 ELECTRONIC CONTROL UNITS

9.5.1 DEMAND FOR ELECTRONICALLY CONTROLLED AIR SUSPENSION TO DRIVE SEGMENT

TABLE 72 AIR SUSPENSION ECU MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 73 AIR SUSPENSION ECU MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 74 AIR SUSPENSION ECU MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 75 AIR SUSPENSION ECU MARKET, BY REGION, 2022–2027 (USD MILLION)

9.6 AIR RESERVOIRS

9.6.1 DEMAND FOR AIR SUSPENSIONS IN HDVS TO IMPACT SEGMENT

TABLE 76 AIR RESERVOIRS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 77 AIR RESERVOIRS MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 78 AIR RESERVOIR MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 79 AIR RESERVOIRS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.7 HEIGHT SENSORS

9.7.1 DEMAND FOR COMFORT AND RIDE QUALITY TO DRIVE SEGMENT

TABLE 80 HEIGHT SENSORS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 81 HEIGHT SENSORS MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 82 HEIGHT SENSORS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 83 HEIGHT SENSORS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.8 SOLENOID VALVES

9.8.1 RISING DEMAND FOR ELECTRONICALLY CONTROLLED AIR SUSPENSIONS TO BOOST SEGMENT

TABLE 84 SOLENOID VALVES MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 85 SOLENOID VALVES MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 86 SOLENOID VALVES MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 87 SOLENOID VALVES MARKET, BY REGION, 2022–2027 (USD MILLION)

9.9 PRESSURE SENSORS

9.9.1 INCREASING AIR SUSPENSION DEMAND IN ASIA PACIFIC TO DRIVE SEGMENT

TABLE 88 PRESSURE SENSORS MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 89 PRESSURE SENSORS MARKET, BY REGION, 2022–2027 (THOUSAND

UNITS)

TABLE 90 PRESSURE SENSORS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 91 PRESSURE SENSORS MARKET, BY REGION, 2022–2027 (USD MILLION)

10 AIR SUSPENSION AFTERMARKET, BY COMPONENT

10.1 INTRODUCTION

10.1.1 RESEARCH METHODOLOGY

10.1.2 ASSUMPTIONS

10.1.3 INDUSTRY INSIGHTS

FIGURE 28 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2022 VS. 2027 (USD MILLION)

TABLE 92 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2018–2021 ('000 UNITS)

TABLE 93 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2022–2027 ('000 UNITS)

TABLE 94 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2018–2021 (USD MILLION)

TABLE 95 AIR SUSPENSION AFTERMARKET, BY COMPONENT, 2022–2027 (USD MILLION)

10.2 AIR BELLOWS

10.2.1 HEAVY DUTY TRUCKS TO LEAD AFTERMARKET

TABLE 96 AIR BELLOWS AFTERMARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 97 AIR BELLOWS AFTERMARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 98 AIR BELLOWS AFTERMARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 99 AIR BELLOWS AFTERMARKET, BY REGION, 2022–2027 (USD MILLION)

10.3 SHOCK ABSORBER BUSHES

10.3.1 INCREASING VEHICLES WITH AIR SUSPENSION ON ROAD TO DRIVE SEGMENT

TABLE 100 SHOCK ABSORBER BUSHES AFTERMARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 101 SHOCK ABSORBER BUSHES AFTERMARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 102 SHOCK ABSORBER BUSHES AFTERMARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 103 SHOCK ABSORBER BUSHES AFTERMARKET, BY REGION, 2022–2027 (USD MILLION)

11 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE

11.1 INTRODUCTION

11.1.1 RESEARCH METHODOLOGY

11.1.2 ASSUMPTIONS

11.1.3 INDUSTRY INSIGHTS

FIGURE 29 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(USD MILLION)

TABLE 104 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(THOUSAND UNITS)

TABLE 105 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(THOUSAND UNITS)

TABLE 106 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(USD MILLION)

TABLE 107 CABIN AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(USD MILLION)

11.2 RIGID TRUCKS

11.2.1 ASIA PACIFIC TO HAVE LARGEST MARKET SHARE

TABLE 108 RIGID TRUCKS: CABIN AIR SUSPENSION MARKET, BY REGION,
2018–2021 (THOUSAND UNITS)

TABLE 109 RIGID TRUCKS: CABIN AIR SUSPENSION MARKET, BY REGION,
2022–2027 (THOUSAND UNITS)

TABLE 110 RIGID TRUCKS: CABIN AIR SUSPENSION MARKET, BY REGION,
2018–2021 (USD MILLION)

TABLE 111 RIGID TRUCKS: CABIN AIR SUSPENSION MARKET, BY REGION,
2022–2027 (USD MILLION)

11.3 SEMI TRAILERS

11.3.1 EUROPE TO SHOWCASE MAXIMUM ADOPTION

TABLE 112 SEMI TRAILERS: CABIN AIR SUSPENSION MARKET, BY REGION,
2018–2021 (THOUSAND UNITS)

TABLE 113 SEMI TRAILERS: CABIN AIR SUSPENSION MARKET, BY REGION,
2022–2027 (THOUSAND UNITS)

TABLE 114 SEMI TRAILERS: CABIN AIR SUSPENSION MARKET, BY REGION,
2018–2021 (USD MILLION)

TABLE 115 SEM TRAILERS: CABIN AIR SUSPENSION MARKET, BY REGION,
2022–2027 (USD MILLION)

12 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE AND REGION

12.1 INTRODUCTION

12.1.1 RESEARCH METHODOLOGY

12.1.2 ASSUMPTIONS

FIGURE 30 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 116 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 117 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 118 ELECTRIC AND HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 119 ELECTRIC & HYBRID HDVS AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

12.2 ELECTRIC AND HYBRID TRUCKS

12.2.1 EUROPE TO BE FASTEST-GROWING REGION

TABLE 120 ELECTRIC AND HYBRID TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 121 ELECTRIC AND HYBRID TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 122 ELECTRIC AND HYBRID TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 123 ELECTRIC AND HYBRID TRUCKS: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

12.3 ELECTRIC AND HYBRID BUSES

12.3.1 OFFERS COMFORT AND HEIGHT CONTROL FEATURES TO IMPROVE RIDE QUALITY

TABLE 124 ELECTRIC AND HYBRID BUSES: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 125 ELECTRIC AND HYBRID BUSES: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 126 ELECTRIC AND HYBRID BUSES: AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 127 ELECTRIC AND HYBRID BUSES: AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

13 AIR SUSPENSION MARKET, BY REGION

13.1 INTRODUCTION

13.1.1 RESEARCH METHODOLOGY

13.1.2 ASSUMPTIONS

13.1.3 INDUSTRY INSIGHTS

FIGURE 31 AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 128 AIR SUSPENSION MARKET, BY REGION, 2018–2021 (THOUSAND UNITS)

TABLE 129 AIR SUSPENSION MARKET, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 130 AIR SUSPENSION MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 131 AIR SUSPENSION MARKET, BY REGION, 2022–2027 (USD MILLION)

13.2 ASIA PACIFIC

13.2.1 CHINA TO HOLD LARGEST SHARE AND INDIA TO BE FASTEST-GROWING MARKET

FIGURE 32 ASIA PACIFIC: AIR SUSPENSION MARKET SNAPSHOT

TABLE 132 ASIA PACIFIC: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 133 ASIA PACIFIC: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 134 ASIA PACIFIC: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 135 ASIA PACIFIC: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.2.2 CHINA

13.2.2.1 Trucks segment to hold largest market share

TABLE 136 CHINA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 137 CHINA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 138 CHINA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 139 CHINA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.2.3 INDIA

13.2.3.1 Higher adoption rate of air suspensions in India

TABLE 140 INDIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 141 INDIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 142 INDIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 143 INDIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, BY REGION, 2022–2027 (USD MILLION)

13.2.4 JAPAN

13.2.4.1 Market driven by higher EV sales

TABLE 144 JAPAN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 145 JAPAN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 146 JAPAN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 147 JAPAN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.2.5 SOUTH KOREA

13.2.5.1 Higher sales of trucks to lead market

TABLE 148 SOUTH KOREA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 149 SOUTH KOREA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 150 SOUTH KOREA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 151 SOUTH KOREA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.2.6 REST OF ASIA PACIFIC

13.2.6.1 Buses to be fastest-growing segment in region

TABLE 152 REST OF ASIA PACIFIC: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 153 REST OF ASIA PACIFIC: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 154 REST OF ASIA PACIFIC: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 155 REST OF ASIA PACIFIC: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.3 EUROPE

13.3.1 GERMANY TO BE FASTEST-GROWING MARKET IN EUROPE

FIGURE 33 EUROPE: AIR SUSPENSION MARKET, 2022 VS. 2027 (USD MILLION)

TABLE 156 EUROPE: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 157 EUROPE: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 158 EUROPE: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 159 EUROPE: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.3.2 GERMANY

13.3.2.1 Passenger cars segment to be fastest growing in Germany

TABLE 160 GERMANY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 161 GERMANY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 162 GERMANY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 163 GERMANY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.3.3 FRANCE

13.3.3.1 Luxury segment to have higher demand for air suspensions

TABLE 164 FRANCE: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 165 FRANCE: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 166 FRANCE: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 167 FRANCE: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.3.4 SPAIN

13.3.4.1 Higher technological adoption due to economic activities

TABLE 168 SPAIN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 169 SPAIN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 170 SPAIN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 171 SPAIN: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.3.5 ITALY

13.3.5.1 Passenger cars to drive air suspension demand

TABLE 172 ITALY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 173 ITALY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027

(THOUSAND UNITS)

TABLE 174 ITALY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(USD MILLION)

TABLE 175 ITALY: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(USD MILLION)

13.3.6 UK

13.3.6.1 LCVs to be fastest-growing market in UK

TABLE 176 UK: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(THOUSAND UNITS)

TABLE 177 UK: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(THOUSAND UNITS)

TABLE 178 UK: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD
MILLION)

TABLE 179 UK: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD
MILLION)

13.3.7 RUSSIA

13.3.7.1 Increased infrastructure activities to drive market

TABLE 180 RUSSIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(THOUSAND UNITS)

TABLE 181 RUSSIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(THOUSAND UNITS)

TABLE 182 RUSSIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021
(USD MILLION)

TABLE 183 RUSSIA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027
(USD MILLION)

13.3.8 REST OF EUROPE

13.3.8.1 Trucks to hold largest share

TABLE 184 REST OF EUROPE: AIR SUSPENSION MARKET, BY VEHICLE TYPE,
2018–2021 (THOUSAND UNITS)

TABLE 185 REST OF EUROPE: AIR SUSPENSION MARKET, BY VEHICLE TYPE,
2022–2027 (THOUSAND UNITS)

TABLE 186 REST OF EUROPE: AIR SUSPENSION MARKET, BY VEHICLE TYPE,
2018–2021 (USD MILLION)

TABLE 187 REST OF EUROPE: AIR SUSPENSION MARKET, BY VEHICLE TYPE,
2022–2027 (USD MILLION)

13.4 NORTH AMERICA

13.4.1 US AND CANADA TO DOMINATE REGIONAL MARKET

FIGURE 34 NORTH AMERICA: AIR SUSPENSION MARKET SNAPSHOT

TABLE 188 NORTH AMERICA: AIR SUSPENSION MARKET, BY COUNTRY,

2018–2021 (THOUSAND UNITS)

TABLE 189 NORTH AMERICA: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 190 NORTH AMERICA: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 191 NORTH AMERICA: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.4.2 US

13.4.2.1 Passenger cars to hold largest market share

TABLE 192 US: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 193 US: AIR SUSPENSION MARKET, BY VEHICLE TYPE, BY REGION, 2022–2027 (THOUSAND UNITS)

TABLE 194 US: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 195 US: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.4.3 CANADA

13.4.3.1 Passenger cars to be fastest-growing segment

TABLE 196 CANADA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 197 CANADA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 198 CANADA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 199 CANADA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.4.4 MEXICO

13.4.4.1 Demand for improved ride experience

TABLE 200 MEXICO: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 201 MEXICO: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 202 MEXICO: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 203 MEXICO: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.5 REST OF THE WORLD

13.5.1 BRAZIL TO BE LARGEST AND FASTEST-GROWING MARKET

TABLE 204 REST OF THE WORLD: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (THOUSAND UNITS)

TABLE 205 REST OF THE WORLD: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (THOUSAND UNITS)

TABLE 206 REST OF THE WORLD: AIR SUSPENSION MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 207 REST OF THE WORLD: AIR SUSPENSION MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.5.2 BRAZIL

13.5.2.1 Growth of tourism sector and luxury vehicles

TABLE 208 BRAZIL: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 209 BRAZIL: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 210 BRAZIL: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 211 BRAZIL: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.5.3 SOUTH AFRICA

13.5.3.1 LCVs to be fastest-growing segment

TABLE 212 SOUTH AFRICA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 213 SOUTH AFRICA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 214 SOUTH AFRICA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 215 SOUTH AFRICA: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

13.5.4 REST OF THE WORLD OTHERS

13.5.4.1 Demand for luxury and comfort

TABLE 216 REST OF THE WORLD OTHERS: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (THOUSAND UNITS)

TABLE 217 REST OF THE WORLD OTHERS: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (THOUSAND UNITS)

TABLE 218 REST OF THE WORLD OTHERS: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 219 REST OF THE WORLD OTHERS: AIR SUSPENSION MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

14 COMPETITIVE LANDSCAPE

14.1 OVERVIEW

14.2 AIR SUSPENSION MARKET SHARE ANALYSIS, 2021

TABLE 220 MARKET SHARE ANALYSIS FOR OE MARKET, 2021

FIGURE 35 AIR SUSPENSION MARKET SHARE ANALYSIS, 2021

14.3 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS

FIGURE 36 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS, 2019–2021

14.4 AIR SUSPENSION COMPONENT SUPPLIERS LIST, 2021

14.4.1 AIR COMPRESSORS

TABLE 221 AIR COMPRESSORS SUPPLIERS LIST, 2021

14.4.2 AIR SPRINGS

TABLE 222 AIR SPRINGS SUPPLIERS LIST, 2021

14.5 COMPANY EVALUATION QUADRANT

14.5.1 STARS

14.5.2 EMERGING LEADERS

14.5.3 PERVASIVE PLAYERS

14.5.4 PARTICIPANTS

FIGURE 37 COMPETITIVE EVALUATION MATRIX (AIR SUSPENSION MANUFACTURERS), 2021

14.6 COMPETITIVE SCENARIO

14.6.1 NEW PRODUCT LAUNCHES

TABLE 223 PRODUCT LAUNCHES, 2020–2022

14.6.2 DEALS

TABLE 224 DEALS, 2019–2022

14.6.3 OTHER DEVELOPMENTS, 2019–2022

TABLE 225 OTHER DEVELOPMENTS, 2019–2022

14.7 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2019–2022

FIGURE 38 COMPANIES ADOPTED NEW PRODUCT DEVELOPMENTS AND EXPANSIONS AS KEY GROWTH STRATEGIES, 2019–2022

14.8 RIGHT TO WIN

14.9 COMPETITIVE BENCHMARKING

TABLE 226 AIR SUSPENSION MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 227 AIR SUSPENSION MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS

15 COMPANY PROFILES

(Business overview, Products offered, Recent developments & MnM View)*

15.1 KEY PLAYERS

15.1.1 ZF FRIEDRICHSHAFEN AG

TABLE 228 ZF FRIEDRICHSHAFEN AG: BUSINESS OVERVIEW

FIGURE 39 ZF FRIEDRICHSHAFEN AG: COMPANY SNAPSHOT

TABLE 229 ZF FRIEDRICHSHAFEN AG: PRODUCTS OFFERED

TABLE 230 ZF FRIEDRICHSHAFEN AG: NEW PRODUCT DEVELOPMENTS

TABLE 231 ZF FRIEDRICHSHAFEN AG: DEALS

TABLE 232 ZF FRIEDRICHSHAFEN AG: OTHER DEVELOPMENTS

15.1.2 CONTINENTAL AG

TABLE 233 CONTINENTAL AG: BUSINESS OVERVIEW

FIGURE 40 CONTINENTAL AG: COMPANY SNAPSHOT

TABLE 234 CONTINENTAL AG: PRODUCTS OFFERED

TABLE 235 CONTINENTAL AG: NEW PRODUCT DEVELOPMENTS

TABLE 236 CONTINENTAL AG: OTHER DEVELOPMENTS

15.1.3 THYSSENKRUPP AG

TABLE 237 THYSSENKRUPP AG: BUSINESS OVERVIEW

FIGURE 41 THYSSENKRUPP AG: COMPANY SNAPSHOT

TABLE 238 THYSSENKRUPP AG: PRODUCTS OFFERED

TABLE 239 THYSSENKRUPP AG: OTHER DEVELOPMENTS

15.1.4 MERITOR, INC.

TABLE 240 MERITOR, INC.: BUSINESS OVERVIEW

FIGURE 42 MERITOR, INC.: COMPANY SNAPSHOT

TABLE 241 MERITOR, INC.: PRODUCTS OFFERED

TABLE 242 MERITOR, INC.: NEW PRODUCT DEVELOPMENTS

TABLE 243 MERITOR, INC.: DEALS

15.1.5 SAF HOLLAND SE

TABLE 244 SAF HOLLAND SE: BUSINESS OVERVIEW

FIGURE 43 SAF HOLLAND SE: COMPANY SNAPSHOT

TABLE 245 SAF HOLLAND SE: PRODUCTS OFFERED

TABLE 246 SAF HOLLAND SE: DEALS

TABLE 247 SAF HOLLAND SE: OTHER DEVELOPMENTS

15.1.6 HENDRICKSON

TABLE 248 HENDRICKSON: BUSINESS OVERVIEW

TABLE 249 HENDRICKSON: PRODUCTS OFFERED

TABLE 250 HENDRICKSON: NEW PRODUCT DEVELOPMENTS

TABLE 251 HENDRICKSON: OTHER DEVELOPMENTS

15.1.7 FIRESTONE INDUSTRIAL PRODUCTS COMPANY, LLC

TABLE 252 FIRESTONE INDUSTRIAL PRODUCTS COMPANY, LLC: BUSINESS OVERVIEW

TABLE 253 FIRESTONE INDUSTRIAL PRODUCTS COMPANY, LLC: PRODUCTS OFFERED

TABLE 254 FIRESTONE INDUSTRIAL PRODUCTS COMPANY, LLC: OTHER DEVELOPMENTS

15.1.8 VIBRACOUSTIC SE

TABLE 255 VIBRACOUSTIC SE: BUSINESS OVERVIEW

TABLE 256 VIBRACOUSTIC SE: PRODUCTS OFFERED

TABLE 257 VIBRACOUSTIC SE: DEALS

15.1.9 MANDO CORPORATION

TABLE 258 MANDO CORPORATION: BUSINESS OVERVIEW

FIGURE 44 MANDO CORPORATION: COMPANY SNAPSHOT

TABLE 259 MANDO CORPORATION: PRODUCTS OFFERED

15.1.10 BWI GROUP

TABLE 260 BWI GROUP: BUSINESS OVERVIEW

TABLE 261 BWI GROUP: PRODUCTS OFFERED

*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

15.2 OTHER KEY PLAYERS

15.2.1 ARNOTT INC.

TABLE 262 ARNOTT INC.: BUSINESS OVERVIEW

15.2.2 BILSTEIN

TABLE 263 BILSTEIN: BUSINESS OVERVIEW

15.2.3 AIR LIFT COMPANY

TABLE 264 AIR LIFT COMPANY: BUSINESS OVERVIEW

15.2.4 INFINITY ENGINEERED PRODUCTS

TABLE 265 INFINITY ENGINEERED PRODUCTS: BUSINESS OVERVIEW

15.2.5 DUNLOP

TABLE 266 DUNLOP: BUSINESS OVERVIEW

15.2.6 VB-AIRSUSPENSION

TABLE 267 VB-AIRSUSPENSION: BUSINESS OVERVIEW

15.2.7 LINK

TABLE 268 LINK: BUSINESS OVERVIEW

15.2.8 UNIVERSAL AIR SUSPENSION

TABLE 269 UNIVERSAL AIR SUSPENSION: BUSINESS OVERVIEW

15.2.9 LIFTMATIC

TABLE 270 LIFTMATIC: BUSINESS OVERVIEW

15.2.10 STEMCO

TABLE 271 STEMCO: BUSINESS OVERVIEW

15.2.11 SHANGHAI KOMMAN

TABLE 272 SHANGHAI KOMMAN: BUSINESS OVERVIEW

15.2.12 JAMNA AUTO

TABLE 273 JAMNA AUTO: BUSINESS OVERVIEW

16 APPENDIX

16.1 INSIGHTS FROM INDUSTRY EXPERTS

16.2 DISCUSSION GUIDE

16.3 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

16.4 CUSTOMIZATION OPTIONS

16.4.1 AIR SUSPENSION MARKET, BY VEHICLE TYPE & TECHNOLOGY

16.4.1.1 Light Duty Vehicles

16.4.1.2 Trucks

16.4.1.3 Buses

16.4.2 AIR SUSPENSION COMPONENT MARKET, BY VEHICLE TYPE

16.4.2.1 Light Duty Vehicles

16.4.2.2 Trucks

16.4.2.3 Buses

16.4.3 DETAILED ANALYSIS AND PROFILING OF ADDITIONAL MARKET
PLAYERS (UP TO 3)

16.5 RELATED REPORTS

16.6 AUTHOR DETAILS

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