

# **Automotive Steering System Market by Technology (HPS, EHPS, EPS), EPS Type (R-EPS, C-EPS, P-EPS), Pinion (Single, Dual), Mechanism (Collapsible, Rigid), Components (OE, Aftermarket), Vehicle (PC, LCV, HCV, EV, OHV) and Region - Global Forecast to 2027**

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## **Abstracts**

The Automotive Steering System market is projected to grow from USD 35.3 Billion in 2022 to USD 39.5 Billion by 2027, at a CAGR of 2.3% over the forecast period.

Growing adoption of EVs, penetration of passenger cars, and an overall increase in vehicle production would fuel the demand for steering systems, especially EPS systems, in the coming years. Also, advancements in autonomous vehicles is expected to drive the demand for Steer-by-Wire Systems.

BEVs hold the largest share of the electric vehicle steering systems market.

With growing investments in EV infrastructure and government subsidies, the demand for EVs is growing. EV sales have increased by almost 100% from 2020 to 2021, reaching 6.6 million units worldwide, which are expected to grow by ~71% in 2023. BEVs contribute to the largest, ~70%, of all EV types. All the BEVs, including commercial trucks and buses, are equipped with EPS as it is easier to draw the required power from the enormous battery packs of EVs. The BEV sales are expected to grow at a CAGR of ~23% from 2022 to 2027, and the demand for steering systems, especially EPS, would grow. As a result of this gain in market share by EVs, the demand for Hydraulic Power Steering (HPS) is decreasing. Owing to the faster adoption of EVs, where the BEVs dominate the market, BEVs are expected to be the largest market segment by EV type for the automotive steering system market.

Europe is the second largest market for the automotive steering system market

Europe holds the second largest market share in vehicle production at 17.1% after Asia Pacific. Luxury vehicles and SUVs are in high demand in this region. The SUV market is expected to grow by CAGR of 4.7% in the region. Amongst vehicle segments, Multi-purpose Vehicles (MPVs) are in higher share in this region than other regions, with ~9% growth expected for this vehicle segment. Luxury vehicles in the region are expected to have growth rates ranging from 8% to 14%. This increase in demand for luxury vehicles will drive the demand for EPS and advanced features such as ADAS-integrated EPS. Commercial vehicle OEMs such as Scania, Volvo, and MAN have introduced Electrically assisted Hydraulic Power Steering (EHPS) in heavy trucks and buses. These OEMs are also, to course, to launch hybrid and all-electric trucks and buses, for example, the Volvo FH, FM, and FMX series, with which the demand for EPS in the commercial vehicle segment will increase. The European market has reached saturation for EPS adoption in the passenger cars segment. The region has moved to adopt EPS in LCVs and HCVs, which will further boost the demand for advanced steering systems in the region.

The breakup of primary respondents

By Stakeholders: Demand Side – 20%, Supply Side – 80%

By Designation: Directors/VPs Level – 30%, C level executives – 10%, Others – 60%

By Region: Asia Oceania – 60%, Europe – 20%, North America – 20%

The Automotive Steering System Market is consolidated, with the presence of five major players JTEKT Corporation (Japan), Nexteer (US), Robert Bosch (Germany), Hyundai Mobis (South Korea), and NSK Ltd. (Japan). The study includes an in-depth competitive analysis of these key players in the automotive steering system 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 automotive steering system market by value and volume. The study segments the automotive

steering system market Component (Steering Columns, Sensors, Steering Gears, Mechanical Rack & Pinions, Electronic Control Units, Electric Motors, Bearings, & Hydraulic Pumps), Electric motor type (Brushed DC motor, & Brushless DC motor), Application (Passenger Cars, Light Commercial Vehicles & Heavy Commercial Vehicles), EPS Type (C-EPS, P-EPS, & R-EPS), EPS Mechanism (Collapsible-EPS, & Rigid-EPS), Pinion type (Single Pinion & Double Pinion), By Technology (Hydraulic Power Steering (HPS), Electrically Assisted Hydraulic Power Steering (E-HPS), & Electric Power Steering (EPS)), Aftermarket, By Component (Hydraulic Pumps, Steering Columns, & Electric Motors), Electric vehicle type (BEV, PHEV, & FCEV), Off-highway vehicle (Agricultural Equipment, & Construction Equipment), By Region - Asia Pacific (China, India, Japan, & South Korea), Europe (Germany, UK, France, Spain, Italy, Russia), North America (US, Canada, and Mexico), and the Rest of the World (Brazil, South Africa).

#### Key Benefits of Buying the Report:

The report will help the market leaders with information on the closest approximations of the revenue numbers for the Automotive Steering System Market and the sub-segments. The study will also help the key players identify the highest potential region and design its product portfolio per market requirements. Detailed research on different Automotive Steering System types and their application is expected to help manufacturers to understand the potential market for these equipment types and which technologies are predominant in the respective equipment. This report includes various analyses like supply chain, average selling price analysis, patent analysis, revenue shift analysis, case study analysis, and porter's analysis. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better 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.

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## ELECTRIC MOTORS

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## 11 ELECTRIC POWER STEERING MARKET, BY TYPE

Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

### 11.1 INTRODUCTION

11.1.1 RESEARCH METHODOLOGY

11.1.2 ASSUMPTIONS

11.1.3 INDUSTRY INSIGHTS



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## 12 ELECTRIC POWER STEERING MARKET, BY ELECTRIC VEHICLE TYPE

Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

### 12.1 INTRODUCTION

#### 12.1.1 RESEARCH METHODOLOGY

#### 12.1.2 PRIMARY INDUSTRY INSIGHTS

#### 12.1.3 ASSUMPTIONS

### 12.2 ASIA PACIFIC

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Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

#### **13.1 INTRODUCTION**

##### **13.1.1 RESEARCH METHODOLOGY**

##### **13.1.2 ASSUMPTIONS**

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Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

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#### 14.1.1 RESEARCH METHODOLOGY

#### 14.1.2 ASSUMPTIONS

#### 14.1.3 INDUSTRY INSIGHTS

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Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

#### 15.1 INTRODUCTION

##### 15.1.1 RESEARCH METHODOLOGY

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## 16 AUTOMOTIVE STEERING SYSTEM AFTERMARKET, BY COMPONENT

Note - The chapter is further segmented at Regional Level and Considered Regions are Asia Pacific, Europe, North America, and Rest of the World

### 16.1 INTRODUCTION

#### 16.1.1 RESEARCH METHODOLOGY

#### 16.1.2 ASSUMPTIONS

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## **17 AUTOMOTIVE STEERING SYSTEM MARKET, BY REGION**

Note – In this chapter each country is further segment by technology type. Technologies considered are HPS, EHPS, and EPS

### **17.1 RESEARCH METHODOLOGY**

#### **17.1.1 ASSUMPTIONS**

#### **17.1.2 INDUSTRY INSIGHTS**

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17.3.2.1 Rapid adoption of EVs to boost demand for EPS and EHPS across vehicle  
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17.3.4.1 Electrification of automotive vehicles to increase demand for EPS and EHPS  
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#### 17.3.5 SOUTH KOREA

17.3.5.1 Growing electric vehicle sales in mid-level segment to drive demand for EPS technology

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#### 17.3.6 REST OF ASIA PACIFIC

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##### 17.4.3.1 Increased penetration of luxury MPVs to drive demand for EPS technology

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##### 17.4.4.1 Growing EV sales to drive demand for EHPS and EPS systems

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17.4.5.1 Increased manufacturing of premium and luxury vehicles to boost demand for EHPS and EPS systems

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17.4.6.1 Growing LCV and MPV sales to drive demand for EPS technology

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17.4.7.1 Growing LCV sales to drive demand for EHPS systems

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TABLE 243 NORTH AMERICA: AUTOMOTIVE STEERING SYSTEM MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

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**17.5.2 US**

17.5.2.1 Ease in steering effort to drive EPS demand in LCVs and HCVs

TABLE 245 US: AUTOMOTIVE STEERING SYSTEM MARKET, BY TECHNOLOGY, 2018–2021 (THOUSAND UNITS)

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### 17.5.3 CANADA

#### 17.5.3.1 LCVs to shift from EHPS to EPS technology in Canada

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### 17.5.4 MEXICO

17.5.4.1 Growing economy and rising income levels to drive demand for EPS technology

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TABLE 255 MEXICO: AUTOMOTIVE STEERING SYSTEM MARKET, BY TECHNOLOGY, 2018–2021 (USD MILLION)

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## 17.6 REST OF THE WORLD

### 17.6.1 RECESSION IMPACT

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### 17.6.2 BRAZIL

#### 17.6.2.1 Fuel efficiency to drive demand for EPS in passenger cars

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\*Details on Business overview, Products offered, Recent Developments, MNM view

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