

Automotive Suspension Market by Architecture (MacPherson Strut, Double Wishbone, Multilink, Twist Beam, Leaf Spring, Air Suspension), System, Actuation, Component, Vehicle (ICE, Electric, Off-Highway, ATV), Aftermarket & Region - Global Forecast to 2027

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Abstracts

The automotive suspension market is expected to grow from USD 45.3 billion in 2022 and is projected to reach USD 51.6 billion in 2027, at a CAGR of 2.6% during the forecast period. Increasing sales of SUVs, EVs, and luxury vehicles globally are driving the suspension market and the rising adoption of air suspension systems in buses and trucks to drive the advanced suspension systems market.

The adoption of the air suspension system is higher in buses as comfort and ride control are primary requirements in buses. Regions such as North America and Europe have the largest demand for air suspension systems as they have the largest number of cargo trucks, passenger luxury buses and coaches. Hence, the demand for air suspension in luxury buses has significantly risen in these regions. Currently, air suspension is no longer a premium feature, it has become a standard feature in passenger buses in western regions, as customers prefer comfort and can pay higher prices for the same. This feature is still in its introductory phase in trucks and buses in the Asia Pacific region due to the cost sensitivity of customers towards products in the region. Bus air suspension systems have evolved in terms of technology, components, and other parameters. In the case of heavy-duty trucks, the demand for air suspension is growing, owing to the need for efficient transportation of goods, and increasing special applications of trucks, such as refrigerated trucks and containers carrying fragile and expensive goods.

Global growth in electric vehicle sales estimated to drive the demand for suspension systems

Global EV sales rose from 1.3 million units in 2018 to 4.3 million units in 2021 with a CAGR of ~45%. This trend is expected to continue as customers move away from ICE vehicles and governments around the world implement policies and regulation in the automotive sector to reduce air pollution. Most Electric passenger cars are equipped with MacPherson strut suspension at front and torsion beam/multilink suspension at rear. Multilink suspension is popular in high end EV cars for example BMW i4 EV, Porsche Taycan use multilink suspension in rear while Tesla model 3 and model Y use air suspension. EVs use the front space as a storage unit in the absence of the internal combustion engine. This allows the manufacturers to use the space in the rear to deploy multilink suspension and provide better ride comfort to passengers. Growing demand for EVs globally is expected to drive the demand for multilink suspension system in the future.

Passenger Car is expected to be the largest market of the automotive suspension market by vehicle type

The passenger cars segment is estimated to be the largest growing market in terms of value and volume. The suspension system is one of the essential systems in any vehicle. Hence, the growth of the suspension system is likely to follow the same trend as the growth in the production volume of passenger vehicles. Post pandemic vehicle production in China and India has picked pace to match the growing demand for passenger vehicles. The growing demand for comfort and safety features also has increased the adoption of independent suspension systems in modern cars.

Asia Pacific region to dominate the global automotive suspension market

The Asia Pacific has emerged as a hub for automotive production in recent years, owing to changing consumer preferences, increasing per capita income of the middle-class population, and cost advantages for OEMs. The Asia Pacific is estimated to account for the largest share of the automotive suspension market, by value, in 2022, due to the presence of automotive OEMs with large vehicle production capacity, higher vehicle sales, and a large customer base. Increasing demand for better comfort in passenger cars has led to the adoption of multilink and air suspension systems in western countries. However, due to their high cost, these systems are still in their introductory phase in the Asia Pacific region.

China is estimated to remain the largest market within the region, owing to its large population and increased demand for passenger vehicles post-pandemic. The country has resumed production close to pre-pandemic levels. By value, India is expected to be the fastest-growing market due to the increased demand for passenger vehicles as the country's economy recovers from the effects of the pandemic.

The breakup of primary respondents

By Company: Tier 2 – 45%, Tier 1 – 40%, Others -15%

By Designation: C level executives - 25%, Directors/Vice-Presidents - 30%, Others – 45%

By Region: Europe - 30%, Asia Oceania - 50%, North America - 20%

The automotive suspension industry is dominated by global players and comprises several regional players, including ZF Friedrichshafen AG (Germany), Tenneco Inc. (US), Continental AG (Germany), ThyssenKrupp AG (Germany), BENTELER (Austria), KYB Corporation (Japan), Marelli (Japan), Mando Corporation (South Korea), and NHK Spring (Japan). 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 segments the automotive suspension market and forecasts the market size based on system (passive suspension, semi-active suspension, and active suspension), active suspension market, actuation (hydraulically actuated and electronically actuated), architecture (MacPherson strut, double wishbone, multilink, twist beam/torsion beam, leaf spring suspension, air suspension), OE market, component (coil spring, air spring, shock dampener, strut, control arm, ball joint, rubber bushing, leaf spring, and sway bar/link stabilizer), aftermarket, component (shock absorber, strut, ball joint, leaf spring, control arm, coil spring), vehicle type (passenger cars, light commercial vehicles, trucks, and buses), electric & hybrid passenger car suspension, architecture (leaf spring suspension, air suspension, double wishbone, MacPherson strut, multilink, twist beam/torsion beam), electric & hybrid trucks and buses suspension, vehicle type (trucks and buses), off-highway application (construction & mining and agricultural tractors), all

terrain vehicle, and Region (Asia Pacific, North America, Europe, and the Rest of the World).

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 automotive suspension 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. A 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 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 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.

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