

Automotive Airbrake System Market - Global Industry Size, Share, Trends, Competition, Opportunity, and Forecast, Segmented By Vehicle Type (Rigid Body Truck, Heavy-Duty Truck, Semi-Trailer, Bus) By Component Type (Compressor, Governor, Storage Tank, Air Dryer, Foot Valve, Brake Chamber & Slack Adjuster and Others) By Brake Type (Air Drum Brake, Air Disc Brake) By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Airbrake System Market is projected to expand from USD 6.83 Billion in 2025 to USD 9.42 Billion by 2031, reflecting a CAGR of 5.52%. Defined as a pneumatic mechanism utilizing compressed air to exert pressure on brake pads, this system is predominantly utilized in heavy commercial vehicles to guarantee safe deceleration under heavy loads. Market expansion is underpinned by stringent government regulations mandating enhanced safety standards and the rising global need for freight transport, which drives the enlargement of commercial fleets and sustains demand for reliable braking components in the heavy-duty truck and bus manufacturing sectors.

Market volumes remain closely tied to commercial vehicle production and registration statistics. As reported by the European Automobile Manufacturers' Association (ACEA), new truck registrations within the European Union reached 327,896 units in 2024. Despite this robust demand, the market faces a significant hurdle regarding the substantial costs involved in installing and maintaining these intricate systems, imposing financial pressure on fleet operators and constraining budgets within the sensitive manufacturing landscape.

Market Driver

The escalating global production and sales of heavy commercial vehicles serve as the primary catalyst for the airbrake system market. As logistics networks grow to support international trade and e-commerce, fleet operators are ramping up the procurement of heavy-duty trucks, which universally require pneumatic braking systems for operational safety, thereby securing demand for critical components like compressors, valves, and actuators. For example, data from the China Association of Automobile Manufacturers indicates that commercial vehicle sales hit approximately 2.07 million units in the first half of 2024, representing a 5% rise over the same period in the prior year.

Furthermore, rising global investments in infrastructure and construction projects are accelerating market growth by increasing the deployment of vocational vehicles. Massive government initiatives, such as the development of highways, airports, and industrial corridors, require a robust fleet of dump trucks and mixers dependent on heavy-duty airbrakes to handle high loads on difficult terrains. According to The Economic Times, the Indian government earmarked Rs 11.11 lakh crore for infrastructure capital expenditure in the Union Budget for fiscal year 2025, ensuring a steady demand for construction vehicles, while major suppliers like Knorr-Bremse reported Commercial Vehicle Systems division revenues of roughly ₹4.2 billion for fiscal year 2023, highlighting the sector's significant economic value.

Market Challenge

The substantial capital investment necessary for the installation and upkeep of airbrake systems acts as a major restraint on market progression. Unlike hydraulic counterparts, these systems rely on intricate pneumatic circuits, compressors, and precision parts that significantly inflate the initial manufacturing costs of heavy commercial vehicles, while specialized servicing adds a persistent operational financial burden. This elevated total cost of ownership establishes a high barrier to entry, especially in price-sensitive markets and for smaller logistics enterprises, frequently resulting in postponed fleet modernization and a stagnation in new component orders.

Such financial sensitivity directly affects the sales volumes of commercial vehicles, which are the primary application for these braking technologies. When rising system prices make vehicle acquisition cost-prohibitive, market demand shrinks, thereby restricting revenue prospects for airbrake suppliers. Data from the Society of Indian Automobile Manufacturers (SIAM) reveals that domestic commercial vehicle sales in

India totaled 956,671 units in the fiscal year 2024-25, marking a 1.2% decline from the previous year, which underscores how economic limitations and high asset costs directly impede the volume growth of the global automotive airbrake sector.

Market Trends

The market is undergoing a structural transformation toward Air Disc Brakes (ADB) as they replace conventional drum mechanisms, driven by the superior thermal management and stopping power offered by disc architectures. Fleet managers increasingly favor ADBs for their enhanced serviceability, which facilitates faster pad replacements and maximizes vehicle uptime. This trend is quantitatively supported by Bendix Commercial Vehicle Systems, which noted in March 2024 that the adoption rate of air disc brakes on Class 6-8 commercial vehicles in North America has exceeded 50%, representing a twofold increase in market penetration since 2018.

Simultaneously, the industry is moving toward Electronically Controlled Braking Systems (EBS), which employ digital signals to actuate components with millisecond precision. EBS is crucial for fleet modernization as it provides the foundation for stability control and advanced driver-assistance systems (ADAS), enhancing tractor-trailer synchronization and safety by eliminating pneumatic latency. The economic relevance of this shift is highlighted by ZF Commercial Vehicle Control Systems India, which reported revenues of INR 3,783.71 Crore in its Integrated Annual Report for FY 2023-24, reflecting a nearly 10% increase fueled by the demand for these advanced braking technologies.

Key Market Players

WABCO

Bendix

Knorr-Bremse

Cummins

Haldex

Meritor

Continental

Bosch

Eaton

Report Scope

In this report, the Global Automotive Airbrake System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Airbrake System Market, By Vehicle Type

Rigid Body Truck

Heavy-Duty Truck

Semi-Trailer

Bus

Automotive Airbrake System Market, By Component Type

Compressor

Governor

Storage Tank

Air Dryer

Foot Valve

Brake Chamber & Slack Adjuster

Others

Automotive Airbrake System Market, By Brake Type

Air Drum Brake

Air Disc Brake

Automotive Airbrake System Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Airbrake System Market.

Available Customizations:

Global Automotive Airbrake System Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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