

# **Automotive Steer-by-Wire (SBW) System Market – Global Industry Size, Share, Trends Opportunity and Forecast, Segmented By Propulsion Type (ICE and Electric), By Vehicle Type (Passenger Car, Light Commercial Vehicle, and Heavy Commercial Vehicle), By Component (Feedback Motors, Angular Sensors, Steering Actuators and Others), By Region, Competition, 2018-2028**

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## **Abstracts**

The Global Automotive Steer-by-Wire (SBW) System Market size reached USD 3.52 Billion in 2022 and is expected to grow with a CAGR of 7.64% in the forecast period.

The Automotive Steer-by-Wire (SBW) System Market is experiencing a transformative shift in the automotive industry, redefining traditional steering mechanisms. SBW replaces conventional mechanical linkages with electronic controls, eliminating the direct physical connection between the steering wheel and the vehicle's wheels. This technology offers a host of advantages, including enhanced maneuverability, precise control, and improved fuel efficiency. The market is witnessing heightened demand driven by the increasing focus on autonomous and electric vehicles, where SBW complements these futuristic technologies by providing seamless integration and adaptable steering responses.

Advancements in sensor technologies, particularly position sensors and feedback mechanisms, are driving the evolution of SBW systems, ensuring accurate and real-time control. The market is marked by a transition from traditional hydraulic and mechanical steering systems to sophisticated electronic systems that offer adaptive

steering functionalities. Safety and reliability are paramount considerations, leading to investments in redundant systems and fail-safe mechanisms to ensure the resilience of SBW technology in various driving conditions.

Geographically, the market is expanding globally, with North America and Europe at the forefront of adoption due to their strong automotive industries and proclivity for technological innovations. Asia-Pacific, particularly China, is emerging as a significant market, driven by a surge in automotive production and a growing demand for advanced driver-assistance features. Latin America and the Middle East are also witnessing gradual integration of SBW systems, albeit at a slower pace. Despite promising prospects, challenges such as cybersecurity concerns, regulatory compliance, and consumer acceptance need to be addressed for the widespread adoption of SBW systems. Nonetheless, the market is poised for continuous growth as automakers and technology providers collaborate to overcome these challenges, aiming to make SBW systems a cornerstone technology in the automotive landscape.

## Key Market Drivers

### Advancements in Electric Vehicle Technology

The global Automotive Steer-by-Wire (SBW) System market is being propelled by the rapid advancement and adoption of electric vehicles (EVs). As the automotive industry shifts toward electrification, SBW systems emerge as a critical component, seamlessly integrating with electric platforms. Their electronic nature facilitates precise control and adaptability, aligning with the eco-friendly and sustainable direction of the automotive landscape.

### Autonomous Driving Integration

The proliferation of autonomous driving technology is a primary driver for the SBW System market. SBW plays a pivotal role in the integration of autonomous features, providing the necessary precision and adaptability for vehicles to navigate complex scenarios. As the industry moves toward higher levels of automation, the demand for SBW systems is on the rise to support the steering requirements of self-driving vehicles.

### Enhanced Fuel Efficiency

SBW systems contribute significantly to improved fuel efficiency, marking them as a driver in the global market. By eliminating traditional mechanical linkages, SBW reduces

vehicle weight, resulting in enhanced fuel economy. This driver aligns with the industry's focus on meeting stringent environmental regulations and addressing consumer demands for more energy-efficient automotive solutions.

### Advanced Driver-Assistance Systems (ADAS)

The demand for advanced driver-assistance features is driving the adoption of SBW systems. These systems support functionalities such as lane-keeping assistance, automated parking, and adaptive cruise control. The integration of SBW enhances safety and convenience, catering to a consumer base increasingly valuing intelligent features that improve overall driving experiences.

### Innovation in Vehicle Design

SBW technology is a catalyst for innovation in vehicle design, marking another significant driver. Automakers leverage the flexibility of SBW to reimagine cabin layouts and steering configurations. This driver reflects a broader industry trend where unique and futuristic vehicle designs are gaining prominence, driven by advancements in electronic control systems like SBW.

### Collaborations and Partnerships

Collaborations between automotive manufacturers and technology providers are driving innovation in the SBW System market. Joint ventures and partnerships leverage the expertise of both parties, fostering the development of advanced SBW systems. These collaborations contribute to the creation of sophisticated steering solutions that incorporate the latest technologies and safety features.

### Customizable Driving Experiences

Consumer demand for customizable driving experiences is fueling the adoption of SBW systems. These systems allow drivers to tailor steering responses to their preferences, contributing to a more personalized driving experience. The ability to adjust steering characteristics aligns with the industry's focus on meeting diverse consumer preferences.

### Advancements in Sensor Technologies

Continual advancements in sensor technologies, particularly position sensors, are

driving the evolution of SBW systems. These sensors enhance the precision and responsiveness of SBW, ensuring accurate and real-time control. As sensor technologies progress, SBW systems become increasingly sophisticated, addressing the need for precise and adaptive steering control in modern vehicles.

## Key Market Challenges

### Cybersecurity Concerns

A primary challenge facing the global Automotive Steer-by-Wire (SBW) system market is the vulnerability to cybersecurity threats. As SBW systems rely on electronic controls and communication networks, they become susceptible to hacking and unauthorized access. Ensuring robust cybersecurity measures is crucial to prevent potential malicious intrusions that could compromise the safety and functionality of the steering system.

### Regulatory Compliance and Standardization

The automotive industry is navigating a complex regulatory landscape with varying safety standards for steering systems globally. Achieving compliance with different regulations and ensuring standardized testing procedures for SBW systems pose significant challenges. The lack of uniform standards can hinder the widespread adoption of SBW technology as automakers navigate compliance requirements in different regions.

### Consumer Acceptance and Trust

Introducing electronic steering systems requires gaining consumer acceptance and trust in the reliability and safety of SBW technology. Some consumers may express reservations about the perceived loss of direct mechanical connection to the steering mechanism. Building confidence through transparent communication about the safety measures and benefits of SBW is crucial to overcome this challenge.

### System Redundancy and Fail-Safe Mechanisms

Ensuring the reliability of SBW systems in the event of component failure or system malfunctions is a critical challenge. Implementing effective redundancy and fail-safe mechanisms to address any potential issues is essential to prevent catastrophic failures. This becomes particularly crucial in scenarios where a loss of steering control could have severe safety implications.

## Complex Integration with Other Vehicle Systems

SBW systems need to seamlessly integrate with various other vehicle systems, including electronic stability control, adaptive cruise control, and autonomous driving features. Achieving harmonious integration and ensuring that SBW complements these systems without causing conflicts or performance issues requires intricate coordination, posing a significant challenge for automotive manufacturers.

## Cost Implications and Affordability

The adoption of SBW systems involves additional costs related to electronic components, sensors, and sophisticated control units. Balancing the integration of advanced technology with cost considerations poses a challenge, especially in price-sensitive market segments. Achieving economies of scale and technological optimizations are essential to make SBW systems more affordable for a broader consumer base.

## Maintenance and Repair Challenges

While SBW systems can reduce certain maintenance requirements, they introduce new challenges in terms of repair and servicing. Specialized training and equipment are often necessary for technicians to diagnose and address issues with electronic steering components. Establishing a robust network of service centers capable of handling SBW-related maintenance is crucial for widespread adoption.

## Infrastructure Readiness

The successful implementation of SBW systems is contingent on the readiness of the infrastructure, including repair facilities and diagnostic tools. Ensuring that service providers and technicians are equipped to handle electronic steering components and diagnose issues is a challenge. Additionally, a lack of standardized diagnostic tools can complicate the servicing process, impacting the overall reliability of SBW systems.

## Key Market Trends

### Integration with Autonomous Driving

A prominent trend in the global Automotive Steer-by-Wire (SBW) system market is its

integration with autonomous driving technologies. As the automotive industry progresses towards autonomous vehicles, SBW systems play a pivotal role in providing the precise and adaptive steering control required for complex driving scenarios. The trend involves the development of SBW systems that seamlessly interface with autonomous systems, enabling a harmonized approach to steering in both manual and autonomous driving modes.

### Electrification and Electric Vehicle Adoption

The increasing adoption of electric vehicles (EVs) is driving the trend of electrification in the automotive sector, influencing SBW systems. SBW, with its electronic control and absence of a physical steering column, aligns well with the design requirements of electric vehicles. The trend involves the development of SBW systems optimized for EV architectures, contributing to the overall efficiency and adaptability of electric mobility solutions.

### Advanced Sensor Technologies

Advancements in sensor technologies are a key trend shaping the SBW system market. The evolution of position sensors, feedback mechanisms, and other sensor components enhances the precision and responsiveness of SBW systems. Manufacturers are investing in cutting-edge sensor technologies to ensure accurate and real-time feedback, enabling SBW systems to deliver optimal steering performance in diverse driving conditions.

### Drive-by-Wire Systems in Concept and Luxury Vehicles

The adoption of SBW technology is particularly pronounced in high-end concept vehicles and luxury car segments. Automakers are integrating SBW systems to showcase innovative features, including customizable steering responses and adaptive driving modes. This trend reflects a consumer demand for cutting-edge technologies and sets the stage for potential future widespread adoption across various vehicle segments.

### Haptic Feedback and Steering Feel Customization

The trend towards haptic feedback and customization of steering feel is gaining traction. SBW systems allow for the incorporation of haptic feedback mechanisms, providing drivers with tactile sensations that mimic traditional steering feel. Moreover,

customizable steering responses enable drivers to personalize their driving experience, adjusting the level of steering assistance and responsiveness based on their preferences.

### Collaborations and Partnerships

Collaborations between automotive manufacturers and technology providers are a prevailing trend in the SBW market. Joint ventures and partnerships aim to leverage the expertise of both parties, fostering innovation in SBW technology. These collaborations often lead to the development of advanced SBW systems that incorporate the latest technologies and safety features, addressing the challenges associated with steering in the era of advanced mobility solutions.

### Development of Redundancy and Safety Features

Ensuring the safety and reliability of SBW systems is a continuous trend, leading to the development of redundancy and fail-safe features. Manufacturers are incorporating redundant systems and safety mechanisms to address potential failures and instill confidence in both consumers and regulatory bodies. This trend aligns with the industry's commitment to enhancing the safety of electronic steering systems.

### Real-world Testing and Validation

The trend of real-world testing and validation is crucial for the successful implementation of SBW systems. Manufacturers are conducting extensive testing in diverse driving conditions to validate the performance, reliability, and safety of SBW technology. Real-world testing helps refine the algorithms, adaptability, and responsiveness of SBW systems, ensuring their effectiveness across various scenarios and contributing to the market's ongoing evolution.

### Segmental Insights

#### By Propulsion Type

The Automotive Steer-by-Wire (SBW) System market encounters unique challenges and opportunities concerning different propulsion types. In the context of Internal Combustion Engines (ICE), SBW systems are tasked with enhancing traditional vehicles' steering dynamics. While ICE vehicles may not inherently demand the same level of electronic sophistication as electric counterparts, SBW in ICE vehicles

contributes to improved fuel efficiency and customizable driving experiences. The challenge lies in integrating SBW seamlessly with existing ICE architectures, addressing concerns related to system weight, power consumption, and compatibility. Additionally, retrofitting SBW into conventional ICE vehicles requires a strategic approach to overcome compatibility hurdles and ensure a smooth transition to advanced steering technology.

In the realm of electric propulsion, SBW technology takes on a pivotal role in shaping the driving experience of Electric Vehicles (EVs). The absence of an internal combustion engine and the shift towards electric platforms provide a conducive environment for the adoption of advanced electronic steering solutions. SBW systems in EVs contribute to optimized steering control, adaptability, and efficiency. The challenge here lies in the integration of SBW with the intricate electronic architectures of electric vehicles, ensuring seamless communication between the steering system and other electric components. Moreover, the weight-conscious nature of electric vehicles emphasizes the need for lightweight and energy-efficient SBW solutions. As electric propulsion continues to dominate the automotive landscape, overcoming these challenges becomes crucial for realizing the full potential of SBW systems in the context of electric vehicles.

### By Vehicle Type

The integration of Steer-by-Wire (SBW) systems in passenger cars marks a paradigm shift in steering technology, offering a range of benefits for both manufacturers and consumers. In the passenger car segment, SBW enhances maneuverability and steering precision. By eliminating traditional mechanical linkages, these systems open up design possibilities for automakers, allowing for more spacious and adaptable interiors. Additionally, SBW technology provides customizable steering responses, catering to diverse driver preferences. As the demand for advanced driver-assistance features and electrification in passenger cars rises, SBW emerges as a key enabler, supporting the industry's evolution toward more efficient, connected, and futuristic vehicles.

In the domain of Light Commercial Vehicles (LCVs), which include vans and pickups, the adoption of SBW systems brings forth improvements in both safety and maneuverability. SBW enhances handling, particularly in urban environments where agility and ease of navigation are critical. The electronic steering control facilitates features such as automated parking, contributing to the efficiency of commercial applications. Furthermore, the space-saving design of SBW aligns with the practical



considerations of LCVs. As the demand for last-mile delivery solutions grows and urban logistics become more complex, the integration of SBW technology in LCVs becomes increasingly significant for meeting these evolving transportation needs.

In the realm of Heavy Commercial Vehicles (HCVs), SBW systems play a pivotal role in reshaping steering dynamics for larger and more complex vehicles. SBW contributes to enhanced stability, control, and safety during long-haul transportation. The adaptability of SBW to varying loads and driving conditions addresses the challenges associated with maneuvering heavy vehicles, providing precise steering control. As the logistics industry explores advancements in connectivity and automation, the integration of SBW systems in HCVs reflects a trend toward optimizing steering capabilities for the demands of heavy-duty commercial applications. The potential benefits in terms of safety and efficiency position SBW as a transformative technology in the HCV segment, contributing to the evolution of commercial vehicle platforms.

## Regional Insights

North America is a dynamic hub for the adoption of Steer-by-Wire (SBW) systems, driven by a combination of technological innovation and a robust automotive industry. The region is characterized by a strong presence of leading automakers and technology companies, fostering collaborations that drive the development of advanced SBW technologies. Regulatory support and a consumer base enthusiastic about cutting-edge automotive features contribute to the rapid integration of SBW systems. The North American market reflects a keen interest in enhancing safety, connectivity, and overall driving experiences, positioning SBW as a key player in the region's automotive evolution.

Europe stands as a pivotal market for SBW systems, emphasizing safety, sustainability, and innovation. European automakers, renowned for their engineering excellence, actively integrate SBW technology to elevate steering precision and support advanced driver-assistance features. Germany, in particular, plays a leading role in SBW research and development, contributing to the overall advancement of electronic steering solutions. The European market showcases a nuanced approach, balancing the adoption of SBW in luxury and performance vehicles with a commitment to meeting stringent safety standards and regulatory requirements.

The Asia-Pacific region, led by automotive giants such as China and Japan, is witnessing a surge in the adoption of SBW systems. China's flourishing electric vehicle market and the emphasis on autonomous driving technologies drive the demand for

advanced steering solutions. Japanese automakers, known for their technological prowess, actively contribute to the evolution of SBW systems. The dynamic automotive landscape in the Asia-Pacific region reflects a blend of consumer demand for innovative features and government initiatives supporting smart mobility solutions. SBW's role in enhancing safety and adapting to diverse driving conditions aligns with the region's aspirations for advanced automotive technologies.

Latin America is gradually incorporating SBW systems into its automotive landscape, navigating economic considerations and diverse regulatory environments. While the adoption may be more gradual compared to other regions, there is a growing interest in enhancing vehicle safety and driving experiences. Collaborations between local manufacturers and global technology providers contribute to the introduction of SBW technology in the region, particularly in urban areas where maneuverability and safety are paramount.

The Middle East and Africa are exploring the potential of SBW systems, aligning with the region's focus on smart city initiatives and sustainable transportation solutions. The luxury vehicle segment in the Middle East, known for its penchant for cutting-edge automotive technologies, contributes to the adoption of SBW in high-end vehicles. As the region embraces advancements in connectivity and automation, SBW technology plays a role in shaping the steering dynamics of vehicles, addressing the unique demands of Middle Eastern roads and driving conditions.

### Key Market Players

Nissan Motor Company Ltd

ZF Friedrichshafen AG

JTEKT Corporation

Thyssenkrupp AG

Paravan GmbH

Nexteer Automotive

Danfoss Power Solutions, Inc.

SKF

LORD Corporation

Eaton Corporation

Report Scope:

In this report, the Global Automotive Steer-by-Wire (SBW) System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Steer-by-Wire (SBW) System Market, By Propulsion Type:

ICE

Electric

Automotive Steer-by-Wire (SBW) System Market, By Vehicle Type:

Passenger Car

Light Commercial Vehicle

Heavy Commercial Vehicle

Automotive Steer-by-Wire (SBW) System Market, By Component:

Feedback Motors

Angular Sensors

Steering Actuators

Others

Automotive Steer-by-Wire (SBW) System Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Automotive Steer-by-Wire (SBW) System Market.

## Available Customizations:

Global Automotive Steer-by-Wire (SBW) System Market report with the given market data, Tech Sci 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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