

Automotive Steering Systems Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Steering System (Manual, Electrically Powered, Electro-Hydraulic Powered, and Hydraulic Powered), By Component (Hydraulic Pump, Steering Sensor & Column, Electric Motor, and Others), By Sales Channel (OEM and Aftermarket), By Region, Competition 2018-2028

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Abstracts

The Global Automotive Steering Systems Market size reached USD 22.74 Billion in 2022 and is expected to grow with a CAGR of 7.44% in the forecast period. The global automotive steering systems market is a dynamic and rapidly evolving industry that plays a crucial role in the automotive sector. Steering systems are essential components of vehicles, enabling drivers to control the direction and maneuverability of their vehicles. This market encompasses the production, distribution, and sale of various types of steering systems used in automobiles. One of the key drivers of the global automotive steering systems market is the overall growth of the automotive industry. As the demand for vehicles continues to rise worldwide, the need for steering systems also increases. The market is directly influenced by factors such as vehicle production, sales, and consumer preferences. The growth of the automotive industry in emerging markets, such as China, India, and Brazil, has been particularly significant in recent years, contributing to the expansion of the steering systems market.

Technological advancements also play a crucial role in shaping the global automotive steering systems market. Manufacturers are constantly developing innovative steering technologies to enhance vehicle safety, improve fuel efficiency, and provide a better driving experience. Electric power steering (EPS) systems, for example, have gained

popularity due to their energy efficiency and improved responsiveness compared to traditional hydraulic power steering systems. Additionally, steer-by-wire systems, which eliminate the mechanical connection between the steering wheel and the wheels, are being developed to enable advanced driver-assistance systems and autonomous driving capabilities.

Government regulations and initiatives also impact the global automotive steering systems market. Governments around the world are implementing stricter safety and emission standards, which drive the adoption of advanced steering technologies. For instance, regulations mandating the use of electric power steering systems to improve fuel efficiency and reduce emissions have influenced the market dynamics.

The competitive landscape of the global automotive steering systems market is characterized by the presence of major automotive manufacturers, suppliers, and technology providers. These companies invest heavily in research and development to develop innovative steering systems and gain a competitive edge. Collaborations and partnerships between automotive manufacturers and steering system suppliers are also common in this market.

In conclusion, the global automotive steering systems market is a dynamic and evolving industry driven by factors such as the growth of the automotive sector, technological advancements, government regulations, and consumer preferences. The market is witnessing a shift towards advanced steering technologies, such as electric power steering and steer-by-wire systems, to meet the demands for safer, more efficient, and autonomous vehicles. With the continued growth of the automotive industry and the increasing focus on vehicle safety and efficiency, the global automotive steering systems market is expected to expand in the coming years.

Key Market Drivers

Increasing Vehicle Production

The global automotive steering systems market is driven by the overall growth of the automotive industry. As the demand for vehicles continues to rise worldwide, there is a corresponding increase in the production of vehicles. This, in turn, drives the demand for steering systems, as every vehicle requires a steering system for maneuverability and control.

Technological Advancements

The automotive steering systems market is influenced by continuous technological advancements. Manufacturers are constantly developing innovative steering technologies to enhance vehicle safety, improve fuel efficiency, and provide a better driving experience. Electric power steering (EPS) systems, for example, have gained popularity due to their energy efficiency and improved responsiveness compared to traditional hydraulic power steering systems.

Government Regulations

Government regulations and initiatives play a significant role in shaping the global automotive steering systems market. Governments around the world are implementing stricter safety and emission standards, which drive the adoption of advanced steering technologies. For instance, regulations mandating the use of electric power steering systems to improve fuel efficiency and reduce emissions have influenced the market dynamics.

Consumer Preferences

Consumer preferences and demands also drive the automotive steering systems market. As consumers become more conscious of safety, comfort, and fuel efficiency, they seek vehicles equipped with advanced steering systems. Features such as responsive steering, easy maneuverability, and advanced driver-assistance systems are increasingly sought after by consumers.

Shift towards Electric Vehicles

The growing popularity of electric vehicles (EVs) is another driver of the automotive steering systems market. EVs typically use electric power steering systems, which are more energy-efficient compared to traditional hydraulic systems. As the demand for EVs continues to rise, the demand for electric power steering systems is also expected to increase.

Autonomous Driving

The development of autonomous driving technology is driving the demand for advanced steering systems. Autonomous vehicles require sophisticated steering systems that can enable precise control and navigation. Steer-by-wire systems, which eliminate the mechanical connection between the steering wheel and the wheels, are being

developed to enable advanced driver-assistance systems and autonomous driving capabilities.

Infrastructure Development

Infrastructure development, particularly in emerging markets, is driving the automotive steering systems market. As countries invest in road and transportation infrastructure, the demand for vehicles increases, leading to a higher demand for steering systems. Emerging markets such as China, India, and Brazil are experiencing rapid growth in the automotive sector, contributing to the expansion of the steering systems market.

Vehicle Safety

Vehicle safety is a critical factor driving the automotive steering systems market. Steering systems play a crucial role in ensuring safe and efficient maneuverability of vehicles. Manufacturers are continuously developing advanced steering technologies to enhance vehicle stability, responsiveness, and control, thereby improving overall safety. The demand for steering systems with features such as electronic stability control and advanced driver-assistance systems is increasing as safety becomes a top priority for consumers and regulatory bodies.

In summary, the global automotive steering systems market is driven by factors such as increasing vehicle production, technological advancements, government regulations, consumer preferences, the shift towards electric vehicles, autonomous driving, infrastructure development, and vehicle safety. These drivers shape the market dynamics and influence the development and adoption of advanced steering technologies in the automotive industry.

Key Market Challenges

Cost Pressure

One of the major challenges in the global automotive steering systems market is cost pressure. Manufacturers face the challenge of developing and producing steering systems that meet the increasing demands for advanced features while keeping the costs competitive. The integration of new technologies and materials can drive up the production costs, making it challenging for manufacturers to strike a balance between innovation and affordability.

Technological Complexity

The rapid advancement of steering system technologies introduces complexity in design, development, and manufacturing processes. Integrating advanced features such as electric power steering, steer-by-wire systems, and autonomous driving capabilities requires sophisticated engineering and software expertise. Managing the complexity of these technologies and ensuring their reliability and compatibility with other vehicle systems can be a significant challenge for manufacturers.

Safety and Reliability

Steering systems are critical components for vehicle safety and reliability. Any failure or malfunction in the steering system can have severe consequences. Manufacturers face the challenge of ensuring the safety and reliability of steering systems by conducting rigorous testing, adhering to strict quality standards, and addressing potential vulnerabilities. Meeting safety regulations and customer expectations for robust and dependable steering systems is a constant challenge.

Integration with Advanced Driver-Assistance Systems (ADAS)

The integration of steering systems with advanced driver-assistance systems (ADAS) poses a challenge for manufacturers. ADAS technologies, such as lane-keeping assist and automated parking, rely on accurate and precise steering control. Ensuring seamless integration and compatibility between steering systems and ADAS technologies requires close collaboration between steering system manufacturers and ADAS technology providers.

Electric Vehicle Compatibility

With the increasing adoption of electric vehicles (EVs), steering system manufacturers face the challenge of developing systems that are compatible with the unique requirements of EVs. Electric power steering (EPS) systems are commonly used in EVs due to their energy efficiency. However, EVs have specific power and torque characteristics that need to be considered in steering system design to ensure optimal performance and responsiveness.

Environmental Regulations

Environmental regulations and sustainability goals pose challenges for the automotive

steering systems market. Manufacturers need to develop steering systems that are environmentally friendly, with reduced energy consumption and lower emissions. This requires the use of lightweight materials, efficient power management systems, and the integration of eco-friendly manufacturing processes.

Supply Chain Management

The global automotive steering systems market relies on a complex supply chain involving multiple suppliers and manufacturers. Managing the supply chain effectively, ensuring timely delivery of components, and maintaining quality standards can be challenging. Any disruption in the supply chain can impact production schedules and lead to delays in delivering steering systems to vehicle manufacturers.

Market Competition

The global automotive steering systems market is highly competitive, with numerous manufacturers vying for market share. Manufacturers face the challenge of differentiating their products and staying ahead of competitors in terms of technology, quality, and cost. Continuous innovation, research and development, and strategic partnerships are essential to maintain a competitive edge in the market.

In summary, the global automotive steering systems market faces challenges such as cost pressure, technological complexity, safety and reliability concerns, integration with ADAS, electric vehicle compatibility, environmental regulations, supply chain management, and market competition. Overcoming these challenges requires a combination of technical expertise, innovation, collaboration, and efficient management practices.

Key Market Trends

Electric Power Steering (EPS) Dominance

Electric power steering (EPS) systems continue to dominate the global automotive steering systems market. EPS systems offer advantages such as improved fuel efficiency, reduced weight, and enhanced responsiveness compared to traditional hydraulic power steering systems. The trend towards EPS is driven by the increasing demand for fuel-efficient vehicles and the integration of advanced driver-assistance systems (ADAS) that rely on electric steering control.

Steer-by-Wire Systems

Steer-by-wire systems are gaining traction in the automotive steering systems market. These systems eliminate the mechanical connection between the steering wheel and the wheels, replacing it with electronic controls. Steer-by-wire systems offer benefits such as increased design flexibility, reduced weight, and the potential for advanced autonomous driving capabilities. As the automotive industry moves towards autonomous vehicles, steer-by-wire systems are expected to play a significant role in enabling advanced driver-assistance features.

Integration of Advanced Driver-Assistance Systems (ADAS)

The integration of advanced driver-assistance systems (ADAS) with steering systems is a prominent trend in the automotive industry. Steering systems are being equipped with features such as lane-keeping assist, adaptive cruise control, and automated parking. These technologies enhance vehicle safety, improve driving comfort, and pave the way for autonomous driving. The demand for steering systems that seamlessly integrate with ADAS is expected to grow as ADAS adoption increases.

Development of Haptic Feedback Systems

Haptic feedback systems are being developed to enhance the driving experience and improve safety. These systems provide tactile feedback to the driver through the steering wheel, alerting them to potential hazards or changes in driving conditions. Haptic feedback can simulate road vibrations, provide warnings for lane departure, or assist in parking maneuvers. The development of haptic feedback systems aims to improve driver awareness and reduce the risk of accidents.

Integration of Artificial Intelligence (AI)

Artificial intelligence (AI) is being integrated into steering systems to enhance their capabilities. AI algorithms can analyze various data inputs, such as road conditions, driver behavior, and sensor data, to optimize steering control and improve vehicle performance. AI-powered steering systems can adapt to different driving conditions, learn from driver preferences, and provide personalized steering assistance.

Focus on Lightweight Materials

The automotive industry's emphasis on lightweighting extends to steering systems.

Manufacturers are exploring the use of lightweight materials such as aluminum and composites to reduce the weight of steering components. Lightweight steering systems contribute to overall vehicle weight reduction, leading to improved fuel efficiency and better handling. The adoption of lightweight materials also aligns with sustainability goals and environmental regulations.

Development of Energy-Efficient Systems

Energy efficiency is a key trend in the automotive industry, and steering systems are no exception. Manufacturers are developing energy-efficient steering systems that minimize power consumption and reduce the load on the vehicle's electrical system. This trend is driven by the increasing adoption of electric vehicles (EVs) and the need to optimize energy usage for extended driving range.

Integration of Sensor Technologies

Sensor technologies are being integrated into steering systems to enhance safety and performance. Sensors such as torque sensors, position sensors, and angle sensors provide real-time data on steering inputs, wheel position, and vehicle dynamics. This data is used to optimize steering control, improve stability, and enable advanced driver-assistance features. The integration of sensor technologies in steering systems contributes to safer and more efficient vehicle operation.

In summary, the global automotive steering systems market is witnessing trends such as the dominance of electric power steering (EPS), the emergence of steer-by-wire systems, the integration of advanced driver-assistance systems (ADAS), the development of haptic feedback systems, the integration of artificial intelligence (AI), the focus on lightweight materials, the development of energy-efficient systems, and the integration of sensor technologies. These trends reflect the industry's focus on improving safety, performance, efficiency, and the overall driving experience.

Segmental Insights

By Steering System

Manual steering systems are the traditional and simplest form of steering systems. They rely on mechanical linkage between the steering wheel and the wheels, allowing the driver to manually control the direction of the vehicle. Manual steering systems are typically found in older vehicles and some entry-level models. However, their market

share has been declining as more advanced steering technologies gain popularity.

Electrically Powered Steering (EPS): Electrically powered steering systems, also known as EPS, have gained significant traction in the automotive industry. EPS systems use an electric motor to assist the driver in steering, reducing the effort required to turn the wheels. EPS offers advantages such as improved fuel efficiency, reduced weight, and enhanced responsiveness compared to traditional hydraulic systems. EPS is widely adopted in various vehicle segments, including passenger cars, light commercial vehicles, and even some heavy-duty vehicles.

Electro-hydraulic powered steering systems combine elements of both electric and hydraulic systems. These systems use an electric motor to drive a hydraulic pump, which provides power assistance to the steering mechanism. Electro-hydraulic systems offer a balance between the energy efficiency of electric systems and the robustness of hydraulic systems. They are commonly found in larger vehicles, such as trucks and SUVs, where higher steering forces are required.

Hydraulic powered steering systems, also known as hydraulic power steering (HPS), use hydraulic fluid and a hydraulic pump to assist the driver in steering. HPS systems have been widely used in the automotive industry for many years. They provide strong power assistance and are known for their reliability and durability. However, hydraulic systems are heavier and less energy-efficient compared to electric systems, which has led to a decline in their market share in recent years.

The market dynamics for each steering system segment vary based on factors such as vehicle type, consumer preferences, and technological advancements. Electrically powered steering systems, particularly EPS, have been experiencing significant growth due to their energy efficiency, improved responsiveness, and compatibility with advanced driver-assistance systems (ADAS). The shift towards electric vehicles (EVs) has also contributed to the increasing adoption of EPS systems.

While manual steering systems still exist in some vehicles, their market share is diminishing as consumers seek more convenience and advanced features. Electro-hydraulic powered steering systems continue to be used in specific vehicle segments that require higher steering forces, such as heavy-duty trucks and off-road vehicles.

In summary, the global automotive steering systems market can be segmented into manual steering, electrically powered steering (EPS), electro-hydraulic powered steering, and hydraulic powered steering. The market dynamics for each segment are

influenced by factors such as energy efficiency, responsiveness, vehicle type, and consumer preferences. The increasing adoption of EPS systems and the shift towards electric vehicles are driving the growth of electrically powered steering systems in the market.

By Component

The hydraulic pump is a key component in hydraulic power steering (HPS) systems. It is responsible for generating hydraulic pressure that assists in steering the vehicle. The pump is typically driven by the engine through a belt or a direct connection. The hydraulic pump pressurizes the hydraulic fluid, which is then directed to the steering gear to provide power assistance to the driver. The efficiency and performance of the hydraulic pump directly impact the responsiveness and ease of steering.

The steering sensor and column are essential components that provide input and feedback to the steering system. The steering sensor detects the position and movement of the steering wheel, transmitting this information to the steering control module. The steering column connects the steering wheel to the steering gear, allowing the driver to control the direction of the vehicle. The steering column may also incorporate additional features such as tilt and telescopic adjustments for driver comfort. The accuracy and reliability of the steering sensor and column are crucial for precise steering control.

The electric motor is a key component in electric power steering (EPS) systems. It provides the necessary power assistance to the driver by applying torque to the steering mechanism. The electric motor is controlled by the steering control module, which receives input from various sensors and adjusts the motor's output accordingly. EPS systems offer advantages such as improved fuel efficiency, reduced weight, and enhanced responsiveness compared to traditional hydraulic systems. The performance and efficiency of the electric motor are critical for the overall performance of the EPS system.

Others: The "others" category includes various additional components that contribute to the functioning of the steering system. This may include components such as steering gears, tie rods, ball joints, and steering linkage. These components work together to transmit the steering input from the driver to the wheels, allowing for precise control and maneuverability. The quality and durability of these components are essential for the overall reliability and safety of the steering system.

The market dynamics for each component segment vary based on factors such as technological advancements, vehicle type, and consumer preferences. With the increasing adoption of electric power steering (EPS) systems, the demand for electric motors and steering control modules is expected to grow. The shift towards electric vehicles (EVs) further drives the demand for electric motor components. Additionally, advancements in sensor technology and steering column design contribute to improved steering system performance and driver comfort.

In summary, the global automotive steering systems market can be segmented into hydraulic pump, steering sensor & column, electric motor, and others. Each component plays a vital role in the functioning and performance of the steering system. The market dynamics for each segment are influenced by factors such as technological advancements, vehicle type, and consumer preferences. The increasing adoption of electric power steering (EPS) systems and the shift towards electric vehicles drive the demand for electric motor components in the market.

Regional Insights

North America is a significant market for automotive steering systems, driven by the presence of major automotive manufacturers and technological advancements in the region. The United States, in particular, has a well-established automotive industry and a high demand for vehicles. The market in North America is characterized by a growing focus on electric power steering (EPS) systems, driven by the need for fuel efficiency and the integration of advanced driver-assistance systems (ADAS). Additionally, government regulations promoting vehicle safety and emission reduction further drive the adoption of advanced steering technologies.

Europe: Europe is another prominent region in the global automotive steering systems market. The region is home to several leading automotive manufacturers and has a strong emphasis on vehicle safety and performance. European countries have stringent safety regulations, which drive the adoption of advanced steering systems. The market in Europe is witnessing a shift towards electric power steering (EPS) systems, driven by the need for energy efficiency and the integration of ADAS. Additionally, the growing demand for electric vehicles (EVs) in Europe contributes to the adoption of electric steering systems.

Asia Pacific: Asia Pacific is a rapidly growing market for automotive steering systems, driven by the increasing production and sales of vehicles in countries such as China, India, and Japan. The region has emerged as a manufacturing hub for the automotive

industry, attracting investments from global automotive manufacturers. The market in Asia Pacific is characterized by a high demand for cost-effective steering systems, which has led to the dominance of hydraulic power steering (HPS) systems. However, there is a growing shift towards electric power steering (EPS) systems due to their energy efficiency and compatibility with advanced technologies. The increasing adoption of electric vehicles (EVs) in countries like China further drives the demand for electric steering systems

Latin America: Latin America is an emerging market for automotive steering systems, with countries like Brazil and Mexico witnessing significant growth in the automotive sector. The market in Latin America is driven by factors such as economic growth, infrastructure development, and increasing consumer purchasing power. The demand for steering systems in the region is influenced by the production and sales of vehicles, with a preference for cost-effective solutions. However, there is a growing trend towards the adoption of advanced steering technologies, including electric power steering (EPS), driven by the need for improved fuel efficiency and safety.

Middle East and Africa: The Middle East and Africa region have a smaller share in the global automotive steering systems market. The market dynamics in this region are influenced by factors such as economic development, infrastructure projects, and government initiatives. The demand for steering systems is driven by the production and sales of vehicles in countries like Saudi Arabia, South Africa, and the United Arab Emirates. The market in this region is witnessing a gradual shift towards advanced steering technologies, including electric power steering (EPS), to meet the growing demand for fuel-efficient and safer vehicles.

In summary, the global automotive steering systems market exhibits regional variations in terms of market size, growth rate, and market dynamics. North America and Europe are characterized by a focus on advanced steering technologies, while Asia Pacific and Latin America show a mix of cost-effective and advanced solutions. The Middle East and Africa region are gradually adopting advanced steering technologies. Factors such as vehicle production, government regulations, consumer preferences, and technological advancements shape the regional trends in the automotive steering systems market.

Key Market Players

TRW Automotive Holdings

Mitsubishi Electric Corporation

Sona Koyo Steering System Ltd

JTEKT Corporation

Nexteer Automotive

Thyssenkrupp Presta

Robert Bosch Automotive Steering GmbH

China Automotive System Inc.

Report Scope:

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

Automotive Steering Systems Market, By Steering System:

Manual

Electrically Powered

Electro-Hydraulic Powered

Hydraulic Powered

Automotive Steering Systems Market, By Component:

Hydraulic Pump

Steering Sensor & Column

Electric Motor

Others

Automotive Steering Systems Market, By Sales Channel:

OEM

Aftermarket

Automotive Steering Systems 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 Steering Systems Market.

Available Customizations:

Global Automotive Steering Systems Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

Automotive Steering Systems Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented...

customization options are available for the report:

Company Information

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

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. IMPACT OF COVID-19 ON GLOBAL AUTOMOTIVE STEERING SYSTEMS MARKET

5. GLOBAL AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Steering System Market Share Analysis (Manual, Electrically Powered, Electro-hydraulic Powered, and Hydraulic Powered)
 - 5.2.2. By Component Market Share Analysis (Hydraulic Pump, Steering Sensor &

Column, Electric Motor, and Others)

5.2.3. By Sales Channel Market Share Analysis (OEM and Aftermarket)

5.2.4. By Regional Market Share Analysis

5.2.4.1. Asia-Pacific Market Share Analysis

5.2.4.2. Europe & CIS Market Share Analysis

5.2.4.3. North America Market Share Analysis

5.2.4.4. South America Market Share Analysis

5.2.4.5. Middle East & Africa Market Share Analysis

5.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2022)

5.3. Global Automotive Steering Systems Market Mapping & Opportunity Assessment

5.3.1. By Steering System Market Mapping & Opportunity Assessment

5.3.2. By Component Market Mapping & Opportunity Assessment

5.3.3. By Sales Channel Market Mapping & Opportunity Assessment

5.3.4. By Regional Market Mapping & Opportunity Assessment

6. ASIA-PACIFIC AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Steering System Market Share Analysis

6.2.2. By Component Market Share Analysis

6.2.3. By Sales Channel Market Share Analysis

6.2.4. By Country Market Share Analysis

6.2.4.1. China Market Share Analysis

6.2.4.2. India Market Share Analysis

6.2.4.3. Japan Market Share Analysis

6.2.4.4. Indonesia Market Share Analysis

6.2.4.5. Thailand Market Share Analysis

6.2.4.6. South Korea Market Share Analysis

6.2.4.7. Australia Market Share Analysis

6.2.4.8. Rest of Asia-Pacific Market Share Analysis

6.3. Asia-Pacific: Country Analysis

6.3.1. China Automotive Steering Systems Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Steering System Market Share Analysis

- 6.3.1.2.2. By Component Market Share Analysis
- 6.3.1.2.3. By Sales Channel Market Share Analysis
- 6.3.2. India Automotive Steering Systems Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Steering System Market Share Analysis
 - 6.3.2.2.2. By Component Market Share Analysis
 - 6.3.2.2.3. By Sales Channel Market Share Analysis
- 6.3.3. Japan Automotive Steering Systems Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Steering System Market Share Analysis
 - 6.3.3.2.2. By Component Market Share Analysis
 - 6.3.3.2.3. By Sales Channel Market Share Analysis
- 6.3.4. Indonesia Automotive Steering Systems Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Steering System Market Share Analysis
 - 6.3.4.2.2. By Component Market Share Analysis
 - 6.3.4.2.3. By Sales Channel Market Share Analysis
- 6.3.5. Thailand Automotive Steering Systems Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Steering System Market Share Analysis
 - 6.3.5.2.2. By Component Market Share Analysis
 - 6.3.5.2.3. By Sales Channel Market Share Analysis
- 6.3.6. South Korea Automotive Steering Systems Market Outlook
 - 6.3.6.1. Market Size & Forecast
 - 6.3.6.1.1. By Value
 - 6.3.6.2. Market Share & Forecast
 - 6.3.6.2.1. By Steering System Market Share Analysis
 - 6.3.6.2.2. By Component Market Share Analysis
 - 6.3.6.2.3. By Sales Channel Market Share Analysis
- 6.3.7. Australia Automotive Steering Systems Market Outlook
 - 6.3.7.1. Market Size & Forecast

6.3.7.1.1. By Value

6.3.7.2. Market Share & Forecast

6.3.7.2.1. By Steering System Market Share Analysis

6.3.7.2.2. By Component Market Share Analysis

6.3.7.2.3. By Sales Channel Market Share Analysis

7. EUROPE & CIS AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Steering System Market Share Analysis

7.2.2. By Component Market Share Analysis

7.2.3. By Sales Channel Market Share Analysis

7.2.4. By Country Market Share Analysis

7.2.4.1. Germany Market Share Analysis

7.2.4.2. Spain Market Share Analysis

7.2.4.3. France Market Share Analysis

7.2.4.4. Russia Market Share Analysis

7.2.4.5. Italy Market Share Analysis

7.2.4.6. United Kingdom Market Share Analysis

7.2.4.7. Belgium Market Share Analysis

7.2.4.8. Rest of Europe & CIS Market Share Analysis

7.3. Europe & CIS: Country Analysis

7.3.1. Germany Automotive Steering Systems Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Steering System Market Share Analysis

7.3.1.2.2. By Component Market Share Analysis

7.3.1.2.3. By Sales Channel Market Share Analysis

7.3.2. Spain Automotive Steering Systems Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Steering System Market Share Analysis

7.3.2.2.2. By Component Market Share Analysis

7.3.2.2.3. By Sales Channel Market Share Analysis

7.3.3. France Automotive Steering Systems Market Outlook

- 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
- 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Steering System Market Share Analysis
 - 7.3.3.2.2. By Component Market Share Analysis
 - 7.3.3.2.3. By Sales Channel Market Share Analysis
- 7.3.4. Russia Automotive Steering Systems Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Steering System Market Share Analysis
 - 7.3.4.2.2. By Component Market Share Analysis
 - 7.3.4.2.3. By Sales Channel Market Share Analysis
- 7.3.5. Italy Automotive Steering Systems Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Steering System Market Share Analysis
 - 7.3.5.2.2. By Component Market Share Analysis
 - 7.3.5.2.3. By Sales Channel Market Share Analysis
- 7.3.6. United Kingdom Automotive Steering Systems Market Outlook
 - 7.3.6.1. Market Size & Forecast
 - 7.3.6.1.1. By Value
 - 7.3.6.2. Market Share & Forecast
 - 7.3.6.2.1. By Steering System Market Share Analysis
 - 7.3.6.2.2. By Component Market Share Analysis
 - 7.3.6.2.3. By Sales Channel Market Share Analysis
- 7.3.7. Belgium Automotive Steering Systems Market Outlook
 - 7.3.7.1. Market Size & Forecast
 - 7.3.7.1.1. By Value
 - 7.3.7.2. Market Share & Forecast
 - 7.3.7.2.1. By Steering System Market Share Analysis
 - 7.3.7.2.2. By Component Market Share Analysis
 - 7.3.7.2.3. By Sales Channel Market Share Analysis

8. NORTH AMERICA AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Steering System Market Share Analysis

8.2.2. By Component Market Share Analysis

8.2.3. By Sales Channel Market Share Analysis

8.2.4. By Country Market Share Analysis

8.2.4.1. United States Market Share Analysis

8.2.4.2. Mexico Market Share Analysis

8.2.4.3. Canada Market Share Analysis

8.3. North America: Country Analysis

8.3.1. United States Automotive Steering Systems Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Steering System Market Share Analysis

8.3.1.2.2. By Component Market Share Analysis

8.3.1.2.3. By Sales Channel Market Share Analysis

8.3.2. Mexico Automotive Steering Systems Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Steering System Market Share Analysis

8.3.2.2.2. By Component Market Share Analysis

8.3.2.2.3. By Sales Channel Market Share Analysis

8.3.3. Canada Automotive Steering Systems Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Steering System Market Share Analysis

8.3.3.2.2. By Component Market Share Analysis

8.3.3.2.3. By Sales Channel Market Share Analysis

9. SOUTH AMERICA AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Steering System Market Share Analysis

9.2.2. By Component Market Share Analysis

9.2.3. By Sales Channel Market Share Analysis

- 9.2.4. By Country Market Share Analysis
 - 9.2.4.1. Brazil Market Share Analysis
 - 9.2.4.2. Argentina Market Share Analysis
 - 9.2.4.3. Colombia Market Share Analysis
 - 9.2.4.4. Rest of South America Market Share Analysis
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Automotive Steering Systems Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Steering System Market Share Analysis
 - 9.3.1.2.2. By Component Market Share Analysis
 - 9.3.1.2.3. By Sales Channel Market Share Analysis
 - 9.3.2. Colombia Automotive Steering Systems Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Steering System Market Share Analysis
 - 9.3.2.2.2. By Component Market Share Analysis
 - 9.3.2.2.3. By Sales Channel Market Share Analysis
 - 9.3.3. Argentina Automotive Steering Systems Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Steering System Market Share Analysis
 - 9.3.3.2.2. By Component Market Share Analysis
 - 9.3.3.2.3. By Sales Channel Market Share Analysis

10. MIDDLE EAST & AFRICA AUTOMOTIVE STEERING SYSTEMS MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Steering System Market Share Analysis
 - 10.2.2. By Component Market Share Analysis
 - 10.2.3. By Sales Channel Market Share Analysis
 - 10.2.4. By Country Market Share Analysis
 - 10.2.4.1. Turkey Market Share Analysis

- 10.2.4.2. Iran Market Share Analysis
- 10.2.4.3. Saudi Arabia Market Share Analysis
- 10.2.4.4. UAE Market Share Analysis
- 10.2.4.5. Rest of Middle East & Africa Market Share Analysis
- 10.3. Middle East & Africa: Country Analysis
 - 10.3.1. Turkey Automotive Steering Systems Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Steering System Market Share Analysis
 - 10.3.1.2.2. By Component Market Share Analysis
 - 10.3.1.2.3. By Sales Channel Market Share Analysis
 - 10.3.2. Iran Automotive Steering Systems Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Steering System Market Share Analysis
 - 10.3.2.2.2. By Component Market Share Analysis
 - 10.3.2.2.3. By Sales Channel Market Share Analysis
 - 10.3.3. Saudi Arabia Automotive Steering Systems Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Steering System Market Share Analysis
 - 10.3.3.2.2. By Component Market Share Analysis
 - 10.3.3.2.3. By Sales Channel Market Share Analysis
 - 10.3.4. UAE Automotive Steering Systems Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Steering System Market Share Analysis
 - 10.3.4.2.2. By Component Market Share Analysis
 - 10.3.4.2.3. By Sales Channel Market Share Analysis

11. SWOT ANALYSIS

- 11.1. Strength
- 11.2. Weakness
- 11.3. Opportunities

11.4. Threats

12. MARKET DYNAMICS

12.1. Market Drivers

12.2. Market Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles (Up to 10 Major Companies)

14.1.1. TRW Automotive Holdings

14.1.1.1. Company Details

14.1.1.2. Key Product Offered

14.1.1.3. Financials (As Per Availability)

14.1.1.4. Recent Developments

14.1.1.5. Key Management Personnel

14.1.2. Mitsubishi Electric Corporation

14.1.2.1. Company Details

14.1.2.2. Key Product Offered

14.1.2.3. Financials (As Per Availability)

14.1.2.4. Recent Developments

14.1.2.5. Key Management Personnel

14.1.3. Sona Koyo Steering System Ltd.

14.1.3.1. Company Details

14.1.3.2. Key Product Offered

14.1.3.3. Financials (As Per Availability)

14.1.3.4. Recent Developments

14.1.3.5. Key Management Personnel

14.1.4. JTEKT Corporation

14.1.4.1. Company Details

14.1.4.2. Key Product Offered

14.1.4.3. Financials (As Per Availability)

14.1.4.4. Recent Developments

14.1.4.5. Key Management Personnel

14.1.5. Nexteer Automotive

14.1.5.1. Company Details

- 14.1.5.2. Key Product Offered
- 14.1.5.3. Financials (As Per Availability)
- 14.1.5.4. Recent Developments
- 14.1.5.5. Key Management Personnel
- 14.1.6. Thyssenkrupp Presta
 - 14.1.6.1. Company Details
 - 14.1.6.2. Key Product Offered
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Recent Developments
 - 14.1.6.5. Key Management Personnel
- 14.1.7. Robert Bosch Automotive Steering GmbH
 - 14.1.7.1. Company Details
 - 14.1.7.2. Key Product Offered
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Recent Developments
 - 14.1.7.5. Key Management Personnel
- 14.1.8. China Automotive System Inc.
 - 14.1.8.1. Company Details
 - 14.1.8.2. Key Product Offered
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Recent Developments
 - 14.1.8.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

- 15.1. Key Focus Areas
 - 15.1.1. Target Regions
 - 15.1.2. Target Steering System
 - 15.1.3. Target Component

16. ABOUT US & DISCLAIMER

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