

Global Power Steering Market Segmented By Vehicle Type (Passenger Cars, Light Commercial Vehicles, Medium & Heavy Commercial Vehicles, Off the Road Vehicles), By Mechanism (Electronic Power Steering (EPS), Hydraulic Power Steering (HPS) and Electro-Hydraulic Power Steering), By Component (Hydraulic Pump, Sensors, Electric Motor and Other Components), By Regional, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

The Global Power Steering Market achieved a valuation of USD 29 billion in 2022 and is expected to exhibit robust growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 6.76% through 2028. The escalating demand for vehicles worldwide has directly fueled the expansion of the automotive steering system market. Numerous companies are spearheading the development of cutting-edge steering technology, including advanced systems such as Steer by Wire (SbW) and control technology.

The automotive steering system comprises a collection of components that govern the direction of vehicle motion and provide drivers with assistance in maneuvering the vehicle. Components like the hand-operated steering wheel, steering column, universal joints, and rack & pinion mechanism all contribute to this crucial system. Technological advancements have led to the transition from manual steering to power-assisted steering, enhancing vehicle control and making the automotive steering system an indispensable component for successful vehicle operation. Given the ubiquity of steering systems in vehicles, the market for automotive steering systems is marked by

intense competition.

Key Market Drivers

1. **Increase in Demand for Automobiles:** The persistent growth in the automobile market, particularly in developing nations like India, China, and Brazil, has driven the demand for steering systems. Major OEMs investing in these regions, such as China, the world's largest car market, further contribute to the growth. The increase in automobile demand corresponds directly to a surge in the need for steering systems to ensure proper vehicle direction control. Additionally, accidents or modifications in the steering system components post-accidents contribute to aftermarket demand.

2. **Adoption of Power Steering Systems:** The transition from manual steering systems, limited by maneuverability and vehicle fuel economy, to power steering systems has significantly impacted the automotive industry. Power steering systems incorporate hydraulics and electronics to enhance driving experience and vehicle efficiency. The widespread adoption of power-assisted steering systems has bolstered the demand for steering systems in the automotive sector.

3. **Power Steering Systems' Cost Factor:** The utilization of power steering systems in various vehicles, from passenger cars to commercial vehicles, has resulted in their higher cost compared to manual systems. Electric motors or hydraulic pistons, central to power steering, contribute to the increased cost. These elevated expenses affect overall vehicle pricing and can act as a limitation to market expansion.

4. **Consumer Preference for Driving Comfort:** Consumer expectations of comfort in their vehicles have led to demands for advanced systems, including power steering. Road conditions in various regions necessitate superior steering systems to enhance driving quality. Both emerging and developed countries require adaptable steering systems to cater to varying road conditions and driving speeds, contributing to enhanced customer satisfaction.

Key Market Challenges

1. **Cost and Affordability:** One of the primary challenges for the Electric Power Steering (EPS) market is the initial development, manufacturing, and implementation costs. While EPS systems offer enhanced efficiency and performance, their upfront costs can be higher compared to traditional hydraulic systems. The integration of electronic components, sensors, and control units contributes to these elevated expenses.

2. **Reliability and Durability:** EPS systems depend heavily on intricate electronic components, sensors, and control algorithms. Ensuring the reliability and durability of these systems is vital for vehicle safety and performance. Components must withstand diverse environmental conditions and road vibrations while maintaining consistent and reliable steering performance throughout the vehicle's lifespan.
3. **Energy Consumption and Battery Impact:** EPS systems rely on the vehicle's electrical system for power, impacting energy consumption, particularly in electric and hybrid vehicles. While designed to be energy-efficient, EPS systems draw power from the vehicle's battery, affecting overall range in electric vehicles and fuel efficiency in hybrids.
4. **Integration with Advanced Technologies:** As vehicles incorporate advanced driver assistance systems (ADAS) and autonomous driving capabilities, integrating EPS systems with these technologies presents a challenge. EPS systems must seamlessly communicate with other electronic systems to ensure safe and coordinated vehicle operation, requiring complex software integration and rigorous testing.
5. **Software Complexity and Cybersecurity:** The intricate software algorithms controlling EPS systems pose challenges in development, testing, and maintenance. Ensuring software security against cyber threats is crucial, as connected vehicles are susceptible to hacking attempts. Manufacturers must invest in robust cybersecurity measures to ensure EPS systems' functionality and safety.
6. **Electromagnetic Interference (EMI):** The electronic components within EPS systems can emit electromagnetic interference that affects nearby electronic systems. This interference can disrupt critical vehicle systems, impacting safety and performance. Proper design and shielding are necessary to mitigate EMI and ensure proper operation of EPS systems.
7. **Maintenance and Repair Complexity:** EPS systems' complexity, with intricate electronic and mechanical components, can lead to challenges in maintenance and repair. These systems often require specialized knowledge, tools, and diagnostics, potentially resulting in higher maintenance costs and delays in repairs. This complexity could be a concern for vehicle owners and operators seeking efficient and cost-effective maintenance solutions.

Key Market Trends

- 1. Sensor Adoption:** The adoption of sensors, such as torque sensors, steering wheel speed sensors, and position sensors, is on the rise to monitor driver inputs and enhance steering system control. Advances in sensor technology and continuous modifications contribute to steering system improvement.
- 2. Electrification Synergy:** The alignment between electric powertrains and EPS systems has synergized the rise of electric vehicles (EVs) and EPS technology. EPS systems are a natural fit for EVs, aligning with the trend toward electric propulsion and contributing to overall vehicle efficiency.
- 3. Autonomous Driving Enabler:** EPS systems are pivotal in enabling autonomous driving. They provide precise steering control based on data from various sensors and play a key role in maneuvering, enhancing safety, and reducing driver workload in self-driving cars.
- 4. Customizable Steering Dynamics:** Modern drivers demand personalized experiences, and EPS systems are meeting this demand with customizable steering dynamics. Adjustable software parameters allow for tailored steering modes, enhancing driver engagement and satisfaction.
- 5. Energy Efficiency and Sustainability:** EPS systems offer superior energy efficiency compared to hydraulic systems. This aligns with the push for sustainability and reduced emissions, making EPS systems essential for meeting environmental goals.

Segmental Insights

By Mechanism Analysis: The Power Steering segment is projected to dominate the market, driven by increasing deployment across vehicle types. The rise of advanced technologies, including steer-by-wire, is expected to fuel growth in this category. Hydraulic power steering is anticipated to grow rapidly, especially in light commercial vehicles due to its absorption of road shocks.

By Vehicle Type Analysis: Passenger cars are poised to dominate the market, attributed to their high sales and production rates. The growing adoption of EPS in passenger cars will contribute to this dominance. Light commercial vehicles are also expected to witness significant growth, driven by the utilization of hydraulic power steering.

Regional Insights

Asia Pacific is expected to lead the automotive steering system market, driven by high automobile sales, particularly in emerging economies. The region's increasing demand for high-end vehicles and disposable income supports market growth.

Europe is projected to be the second-largest market stakeholder, with fuel economy standards driving the use of efficient steering systems. The rise of electric vehicles also contributes to the growing deployment of EPS systems.

North America is likely to experience strong growth, driven by major automakers operating in Canada and the United States, leading to a rise in hydraulic power steering system adoption.

Key Market Players

Showa Corporation

Nexteer Automotive Corporation

NSK Ltd

JTEKT Corporation

Robert Bosch GmbH

Mando Corporation

Sona Corporation

ZF Friedrichshafen AG

Hitachi Automotive Systems Limited.

Report Scope:

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

Power Steering Market, By Vehicle Type:

Global Power Steering Market Segmented By Vehicle Type (Passenger Cars, Light Commercial Vehicles, Medium & He...

Passenger Cars

Light Commercial Vehicle

Medium & Heavy Commercial Vehicle

Off the Road Vehicle

Power Steering Market, By Mechanism:

Electronic Power Steering (EPS)

Hydraulic Power Steering (HPS)

Electro-Hydraulic Power Steering (EHPS)

Power Steering Market, By Component:

Hydraulic Pump

Sensors

Electric Motor

Others

Power Steering 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

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Power Steering Market.

Available Customizations:

Global Power Steering 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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