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# Global Tire Pressure Monitoring System (TPMS) Market Segmented By Type (Direct TPMS and Indirect TPMS), By Sales Channel Type (OEM and Aftermarket), By Vehicle Type (Passenger Cars and Commercial Vehicles), By Regional, Competition Forecast & Opportunities, 2018 – 2028F

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## Abstracts

The Global Tire Pressure Monitoring System (TPMS) Market achieved a valuation of USD 5 billion in 2022 and is poised for robust growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 8% through 2028. This market plays a pivotal role in enhancing vehicle safety, optimizing fuel efficiency, and reducing the environmental footprint of vehicles.

TPMS is a technology that monitors the air pressure in a vehicle's tires and promptly alerts the driver if the pressure falls below recommended levels. Its significant traction in the market can be attributed to its substantial contribution to road safety and the increasing emphasis on energy efficiency in the automotive industry. Government regulations and safety standards have played a crucial role in driving the widespread adoption of TPMS across the globe. Several countries have implemented regulations mandating the installation of TPMS in vehicles to mitigate accidents caused by underinflated tires. This regulatory push has provided strong impetus for both vehicle manufacturers and aftermarket service providers to incorporate TPMS into their offerings, consequently driving market growth.

Moreover, the automotive industry's continuous efforts to enhance fuel efficiency and reduce emissions have further fueled the demand for TPMS. Underinflated tires not only pose safety risks but also lead to increased rolling resistance, resulting in decreased

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fuel efficiency. TPMS aids vehicle owners in maintaining proper tire pressure, ensuring optimal fuel consumption, and contributing to environmental sustainability.

The TPMS market is also experiencing technological advancements that bolster its capabilities. There are two main types: Direct TPMS, which uses sensors within the tires to monitor pressure, and Indirect TPMS, which utilizes the vehicle's existing sensors to infer tire pressure. As technology evolves, more advanced TPMS solutions are being developed, including wireless connectivity, real-time monitoring through smartphone applications, and integration with vehicle telematics systems.

The growing popularity of electric vehicles (EVs) and hybrid vehicles has had a significant impact on the TPMS market. These vehicles have unique tire pressure requirements due to their weight distribution and powertrain characteristics. As the adoption of EVs and hybrids continues to rise, so does the demand for specialized TPMS solutions tailored to meet their specific needs.

Key Market Drivers

1. Vehicle Safety and Accident Prevention: A primary driver of the global TPMS market is the paramount concern for vehicle safety and accident prevention. Underinflated or overinflated tires can lead to decreased traction, reduced vehicle stability, and increased braking distances, thereby increasing the risk of accidents. TPMS continuously monitors tire pressure and promptly alerts drivers to deviations from recommended levels, enabling timely corrective action and significantly reducing the likelihood of accidents caused by tire-related issues.

2. Government Regulations and Mandates: Government regulations mandating TPMS installation in vehicles have been pivotal drivers of its widespread adoption. Many countries and regions have implemented regulations requiring new vehicles to be equipped with TPMS as a safety standard. For example, the United States introduced the Transportation Recall Enhancement, Accountability, and Documentation (TREAD) Act, which mandates TPMS installation to prevent accidents caused by tire failures. Such regulations create a strong incentive for automakers to integrate TPMS into their vehicles, driving market growth.

3. Fuel Efficiency and Environmental Concerns: The emphasis on fuel efficiency and environmental sustainability in the automotive industry is driving the demand for TPMS. Underinflated tires increase rolling resistance, leading to decreased fuel efficiency. By maintaining proper tire pressure, TPMS helps optimize fuel consumption, reducing the

carbon footprint of vehicles and contributing to environmental preservation. As fuel efficiency becomes a significant consumer preference and regulatory requirement, TPMS adoption becomes essential for automakers to meet these expectations.

4. Reduced Operating Costs for Fleets: Fleet operators and commercial vehicle owners are increasingly recognizing the economic benefits of TPMS adoption. Properly inflated tires experience less wear and tear, resulting in extended tire lifespan and reduced maintenance costs. In the context of fleet operations, where vehicle downtime translates to financial losses, TPMS contributes to enhanced operational efficiency and cost savings by minimizing tire-related breakdowns and repairs.

5. Improved Tire Performance and Longevity: TPMS ensures that tires are maintained at optimal pressure levels, directly contributing to improved tire performance and longevity. Properly inflated tires exhibit better traction, handling, and braking performance. This not only enhances driving safety but also extends the lifespan of tires, reducing the frequency of tire replacements and associated expenses for vehicle owners.

6. Advancements in Technology and Connectivity: Technological advancements in the automotive sector have led to the integration of advanced sensors, connectivity features, and data analytics in TPMS systems. Wireless sensors communicate real-time tire pressure data to the vehicle's dashboard, allowing drivers to monitor tire conditions effortlessly. Some TPMS systems even offer smartphone integration, enabling users to receive alerts and updates remotely. These technological innovations enhance user convenience and expand the potential applications of TPMS.

7. Growing Demand for Electric Vehicles (EVs) and Hybrids: The rising popularity of electric vehicles and hybrid vehicles has further fueled the demand for TPMS. EVs and hybrids have unique tire pressure requirements due to their distinct weight distribution, powertrain characteristics, and regenerative braking systems. As the adoption of these vehicles increases, the need for specialized TPMS solutions tailored to their specific needs grows, positioning the market to cater to the evolving automotive landscape.

8. Consumer Awareness and Education: Increased consumer awareness of the importance of proper tire maintenance and its impact on safety and fuel efficiency has contributed to the growth of the TPMS market. As drivers become more conscious of tire-related issues, the demand for vehicles equipped with TPMS rises. Manufacturers are also incorporating educational initiatives to inform consumers about the benefits of TPMS and proper tire care practices.

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9. Insurance Premium Incentives: In some regions, insurance companies offer incentives or discounts to vehicle owners who have TPMS installed. Insurance providers recognize that TPMS contributes to reducing the likelihood of accidents caused by tire failures. As a result, vehicle owners may receive reduced insurance premiums, creating an additional motivation for TPMS adoption.

10. Aftermarket Growth and Retrofitting: The aftermarket segment of the TPMS market is witnessing growth, as vehicle owners seek to retrofit their existing vehicles with TPMS systems to benefit from safety enhancements and improved fuel efficiency. Aftermarket TPMS solutions cater to a wide range of vehicle types, making it accessible to a diverse consumer base and contributing to overall market expansion.

Key Market Challenges

1. Technological Complexity and Integration: The integration of TPMS technology into vehicles can be complex, requiring compatibility with various vehicle systems and sensors. Ensuring seamless integration without compromising other vehicle functions poses a challenge. Moreover, as vehicles become more technologically advanced, TPMS systems must keep pace with evolving vehicle architectures and connectivity requirements.

2. Sensor Reliability and Accuracy: TPMS relies on sensors to accurately measure tire pressure. Ensuring the reliability and accuracy of these sensors in varying environmental conditions, such as extreme temperatures or road conditions, is critical. Sensor malfunctions or inaccuracies can lead to false alerts or missed notifications, undermining the effectiveness of the TPMS system.

3. Battery Life and Maintenance: Sensors in TPMS systems are powered by batteries, which have a limited lifespan. Over time, the battery performance can degrade, affecting the accuracy and reliability of the sensor data. Replacing these batteries can be challenging, especially in integrated sensor designs that require tire removal, leading to additional maintenance and potential cost concerns for vehicle owners.

4. Regulatory Differences and Harmonization: While regulatory mandates drive TPMS adoption in many regions, differences in regulatory requirements across countries and jurisdictions create challenges for manufacturers

. Ensuring compliance with varying standards can lead to additional engineering efforts

and costs. Harmonizing regulations could streamline adoption and facilitate global implementation.

5. Retrofitting Challenges: Retrofitting older vehicles with TPMS systems can be challenging due to compatibility issues and potential modifications needed to integrate the technology. Aftermarket solutions need to address various vehicle models, making it more complex to provide a universal retrofit solution that ensures accurate data and proper functioning.

6. False Alerts and User Perception: TPMS systems can generate false alerts due to sensor inaccuracies or temporary fluctuations in tire pressure. Frequent false alerts may lead to driver desensitization, causing drivers to ignore genuine alerts. Striking the right balance between timely alerts and avoiding unnecessary notifications is a challenge in TPMS design.

7. Sensor Replacement Costs: If a sensor malfunctions or requires replacement due to battery depletion, the associated costs can be significant. Vehicle owners may face challenges in finding cost-effective replacement options, especially if they need to rely on original equipment manufacturer (OEM) sensors.

8. Calibration and Maintenance Requirements: Proper calibration is essential for accurate TPMS functioning. When tires are rotated or replaced, TPMS sensors may need to be recalibrated, which requires specialized equipment and knowledge. This calibration process can add complexity to routine tire maintenance and increase costs for vehicle owners.

9. Economic Considerations: The initial cost of integrating TPMS systems into vehicles can impact pricing, especially in budget-conscious vehicle segments. Additionally, the costs associated with maintenance, sensor replacement, and potential recalibration can influence the overall ownership experience for consumers.

10. Education and Awareness: While consumer awareness of TPMS benefits is growing, some drivers may still lack a clear understanding of its importance. Educating consumers about the significance of proper tire pressure maintenance, the role of TPMS, and its impact on safety and efficiency remains a challenge.

Key Market Trends

1. Integration with Connected Vehicles: The integration of TPMS with connected vehicle

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technologies is a major trend in the market. TPMS is becoming an integral part of vehicle telematics systems, allowing real-time monitoring of tire pressure and temperature data. This integration enables drivers to receive alerts and notifications on their dashboard screens, smartphones, or other connected devices. The data collected by TPMS can also be used to enhance overall vehicle performance and diagnostics, contributing to a more comprehensive connected driving experience.

2. IoT and Predictive Maintenance: The Internet of Things (IoT) is transforming the TPMS landscape by enabling predictive maintenance strategies. TPMS sensors collect a wealth of data on tire conditions, which can be analyzed to predict potential issues and maintenance needs. This data-driven approach allows vehicle owners and fleet managers to proactively address tire-related concerns, minimizing downtime, reducing maintenance costs, and enhancing operational efficiency.

3. Direct vs. Indirect TPMS: The ongoing debate between direct and indirect TPMS systems is shaping market dynamics. Direct TPMS uses sensors within each tire to directly measure tire pressure, providing accurate and real-time data. Indirect TPMS, on the other hand, relies on vehicle sensors to infer tire pressure based on factors like wheel speed. Both approaches have their advantages and challenges, with direct systems offering higher accuracy but potentially higher costs, while indirect systems can be more cost-effective but may have accuracy limitations.

4. Electrification and Alternative Propulsion Systems: The rise of electric vehicles (EVs) and alternative propulsion systems is influencing TPMS design. EVs have unique tire pressure requirements due to their different weight distribution and powertrain characteristics. As the adoption of EVs grows, specialized TPMS solutions tailored to these vehicles are becoming more prevalent. Additionally, the weight distribution in hybrid and electric vehicles can impact tire wear, making accurate TPMS even more crucial for optimal performance and safety.

5. Aftermarket Growth and Retrofits: The aftermarket segment of the TPMS market is experiencing growth due to the increasing popularity of retrofitting existing vehicles with TPMS systems. Vehicle owners are recognizing the safety and efficiency benefits of TPMS and are seeking solutions to upgrade their vehicles. Aftermarket TPMS providers are offering a range of options to cater to different vehicle models and user preferences, contributing to the expansion of the retrofit market.

6. Sustainability and Environmental Concerns: Growing environmental awareness is driving interest in sustainable automotive solutions, including tire pressure

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management. Properly inflated tires contribute to fuel efficiency and reduced emissions, aligning with environmental goals. As consumers prioritize sustainability, TPMS is being viewed as a tool not only for safety but also for minimizing the environmental impact of vehicle operations.

7. Enhanced Data Analytics and Insights: The proliferation of data analytics tools is transforming TPMS data into actionable insights. Manufacturers, fleet operators, and vehicle owners can analyze tire performance data to optimize routes, predict maintenance needs, and improve overall operational efficiency. These insights enable data-driven decision-making for better resource allocation and enhanced safety.

8. Smart Tire Technology: Advancements in smart tire technology are influencing TPMS innovation. Smart tires incorporate sensors directly into the tire structure, providing more accurate data on tire conditions, including temperature, pressure, and wear. This real-time data can offer more comprehensive insights into tire performance, contributing to improved safety and performance.

9. Regulatory Evolution: While regulatory mandates initially drove TPMS adoption, the evolution of regulations continues to influence the market. Some regulations are becoming more stringent, specifying accuracy requirements and expanding coverage to include light-duty trucks and buses. Staying compliant with evolving regulations poses both challenges and opportunities for manufacturers and vehicle owners.

10. AI and Machine Learning Applications: Artificial intelligence (AI) and machine learning are being explored to enhance TPMS capabilities. These technologies can analyze vast amounts of data from sensors, vehicle systems, and external factors to provide more accurate and predictive insights. AI-driven algorithms can identify patterns and anomalies, helping drivers and operators make informed decisions related to tire maintenance and safety.

Segmental Insights

By Type Insights

The global Tire Pressure Monitoring System (TPMS) market can be segmented into two main types: Direct TPMS and Indirect TPMS.

Direct TPMS is a highly effective technology that monitors the pressure in each tire individually. Equipped with pressure sensors in the valve stems, the system provides

real-time data about tire pressure directly to the driver through the vehicle's instrument panel. The advantage of direct TPMS is its accuracy and prompt detection of any pressure anomalies, thus enhancing driving safety. However, the higher cost associated with its implementation, maintenance, and the need for battery replacements can be viewed as potential drawbacks.

Indirect TPMS, on the other hand, uses the vehicle's anti-lock braking system's speed sensors to estimate tire pressure. It does so by monitoring the rotational speed of the tires; a deflated tire will rotate faster due to its smaller radius. This system's advantage lies in its affordability and easy maintenance as it doesn't require additional sensors or battery replacements. However, indirect TPMS falls short in terms of accuracy, particularly in the event of uniform pressure loss across all tires.

Despite the differences, both types serve the crucial role of maintaining optimal tire pressure, enhancing fuel efficiency, ensuring vehicular safety, and extending tire lifespan. Their adoption rates vary across regions, largely depending on regulatory requirements. For instance, in countries like the U.S. and those across the European Union, the implementation of TPMS in new vehicles is regulated and thus, widespread. In contrast, in emerging markets, the adoption is typically driven by consumer awareness and demand for enhanced safety features.

In conclusion, both Direct and Indirect TPMS have their distinct advantages and limitations. The choice between the two largely depends on factors such as cost considerations, need for accuracy, maintenance preferences, and regulatory requirements. As market dynamics evolve and technological advancements continue, the TPMS landscape is expected to witness significant changes, promising improved features and better user experience.

Vehicle Type Insights

The global Tire Pressure Monitoring System (TPMS) market has seen a significant surge, primarily driven by the growing emphasis on safety and increased awareness about tire maintenance among vehicle owners. The market can be segmented based on vehicle types, including passenger vehicles, light commercial vehicles, and heavy commercial vehicles.

Passenger vehicles make up a major portion of the TPMS market. This can be attributed to the soaring production and sales of passenger cars globally, coupled with the fact that stringent safety regulations in various countries mandate the installation of

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TPMS in new passenger vehicles. The introduction of advanced features such as smartphone integration is also aiding the adoption of TPMS in this segment.

Light commercial vehicles, on the other hand, are anticipated to register substantial growth over the next few years. The constant demand for these vehicles in parcel and courier services, along with the increasing emphasis on fleet management, is expected to propel the TPMS market in this segment. Furthermore, the trend of equipping these vehicles with advanced safety systems for better fleet efficiency is driving the demand for TPMS in light commercial vehicles.

Heavy commercial vehicles, meanwhile, are seeing steady demand for TPMS. These vehicles are typically used for long-haul transport and therefore put more strain on tires, making TPMS an essential component for maintaining tire health and ensuring overall vehicle safety. In addition, the growing trend of digitization in the transportation sector is likely to further boost the adoption of TPMS in heavy commercial vehicles.

Regional Insights

The global Tire Pressure Monitoring System (TPMS) market has witnessed significant growth, fueled by increased road safety consciousness among consumers, regulatory mandates, and advances in technology. Regional dynamics reveal interesting insights.

North America represents a substantial share of the global TPMS market. High consumer awareness, stringent safety regulations, and the prevalence of luxury vehicles are key drivers in this region. The U.S, with its Federal Motor Vehicle Safety Standards (FMVSS) requiring all new passenger vehicles to be equipped with TPMS, significantly contributes to the market size.

In Europe, the market is buoyed by regulatory mandates like the European Union directive, which necessitates the installation of TPMS in all new passenger cars. The high adoption rate of advanced vehicle safety systems across countries like Germany, France, and the United Kingdom further bolsters growth.

Asia-Pacific is anticipated to manifest the fastest growth within the TPMS market, with regions like China, Japan, South Korea, and India leading the charge. Factors such as increasing vehicle production, rising demand for luxury vehicles, and growing awareness about vehicle safety contribute to this trend.

The Middle East and Africa show a steady growth rate, with the Middle East countries

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such as Saudi Arabia and the UAE driving demand due to high luxury car sales. The African market, though nascent, is promising with rising vehicle sales and a growing middle class.

In Latin America, despite economic volatility, the market is witnessing growth due to increased consumer awareness about safety, driven by regulatory changes. Brazil and Mexico are among the leading markets in this region.

Key Market Players

Delphi Automotive

DENSO Corporation

Continental AG

ZF TRW

Valor TPMS

Pacific Industrial

Schrader Electronics

Hella KGaA Hueck & Co.

Valeo

ALLIGATOR Ventilfabrik GmbH

Report Scope:

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

Global Tire Pressure Monitoring System Market, By Type:

Direct TPMS

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Indirect TPMS

Global Tire Pressure Monitoring System Market, By Sales Channel:

OEM

Aftermarket

Global Tire Pressure Monitoring System Market, By Vehicle Type:

Passenger Cars

Commercial Vehicles

Global Tire Pressure Monitoring System Market, Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

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France

Russia

Italy

United Kingdom

Belgium

North America

United States

Mexico

Canada

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

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Company Profiles: Detailed analysis of the major companies present in the Global Tire Pressure Monitoring System Market.

Available Customizations:

Global Tire Pressure Monitoring 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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