

Europe Heavy Commercial Vehicle Air Brake Market Size and Forecast (2019 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Compressor, Reservoir, Foot Valve, Brake Lining and Drum or Rotors, Brake Shoes, and Others), Type (Air Disc Brake and Air Drum Brake), Technology [Conventional Air Brake System, Electronically Controlled Air Braking System (ECAS), and Antilock Braking System (ABS)], Distribution Channel (OEMs and Aftermarket), and Vehicle Type (Bus, Truck, Construction Equipment, and Tractor)

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Abstracts

The Europe Heavy Commercial Vehicle Air Brake Market is projected to grow significantly, reaching an estimated US\$ 12,927.2 million by 2031, up from US\$ 6,513.6 million in 2023. This growth represents a compound annual growth rate (CAGR) of 9.0% from 2023 to 2031. Key countries driving this market include Germany, France, the UK, and Italy, which are central to the automotive industry in Europe. The European Commission is actively supporting the automotive sector by funding research and development initiatives to maintain the region's technological leadership and competitiveness in the global market.

Europe is a major hub for heavy-duty vehicle production, with the European Automobile Manufacturers' Association (ACEA) reporting a 7.5% decline in new truck registrations in 2024, totaling 249,708 units from January to September. This decline was primarily

due to a 9.5% drop in heavy truck sales, although medium truck sales saw a 3% increase. Notably, Italy and Spain experienced growth rates of approximately 2.1% and 12%, respectively, while bus sales surged by around 16%, totaling 27,400 units during the same period. The overall growth in vehicle sales, particularly in Italy (+21%) and Spain (+21.8%), indicates a robust market environment.

The increasing production of commercial vehicles, especially heavy-duty buses, coupled with heightened government focus on safety regulations for heavy-duty vehicles, is expected to drive demand for air brake systems. Major manufacturers in the air brake systems market, such as ZF Friedrichshafen AG, Knorr-Bremse Commercial Vehicle Systems GmbH, and Haldex AB, are contributing to the market's expansion in Europe.

Market Segmentation

The Europe Heavy Commercial Vehicle Air Brake Market can be segmented based on various criteria:

By Component: The market is divided into several components, including Compressor, Reservoir, Foot Valve, Brake Lining and Drum or Rotors, Brake Shoes, and Others. In 2023, Brake Lining and Drum or Rotors held the largest market share.

By Type: The market is categorized into Air Disc Brake and Air Drum Brake, with Air Drum Brake leading in market share in 2023.

By Technology: The market includes Conventional Air Brake Systems, Electronically Controlled Air Braking Systems (ECAS), and Antilock Braking Systems (ABS), with Conventional Air Brake Systems dominating in 2023.

By Distribution Channel: The market is segmented into OEMs and Aftermarket, where OEMs held the largest share in 2023.

By Vehicle Type: The market is divided into Bus, Truck, Construction Equipment, and Tractor, with Trucks holding the largest share in 2023.

Strategic Insights

Manufacturers are increasingly focusing on developing hybrid braking systems that enhance braking efficiency and energy recovery by integrating regenerative braking systems with traditional air brakes. This innovative approach allows the regenerative system to engage when the driver applies the brakes, capturing energy during

deceleration, while the air brake system provides the necessary stopping power. This dual-system not only improves braking performance but also reduces wear on air brake components, leading to lower maintenance costs and extended system life.

The rise of electric commercial vehicles is expected to create significant growth opportunities for the air brake system market, particularly with the integration of regenerative braking technologies. For instance, Robert Bosch GmbH has developed regenerative braking systems that meet stringent safety standards for both standard and electric braking systems. In June 2023, British electric vehicle manufacturer Tevva collaborated with German tech company ZF to create a regenerative braking system for its 7.5-ton battery-electric truck, which can recover up to four times more energy than conventional air brake systems. This advancement not only enhances energy efficiency but also reduces brake wear, resulting in lower maintenance costs and improved vehicle range.

Country Insights

The market is further analyzed by country, with Germany being the largest market in 2023. Germany is a global automotive powerhouse, hosting major vehicle manufacturers like Volkswagen and BMW AG, and is a key player in the automotive components sector. The automotive industry in Germany generated revenues of US\$ 347.46 billion in 2021, with a significant portion attributed to both domestic and international markets. The country's well-established automotive ecosystem supports the production of a wide range of commercial vehicles, and the increasing output of heavy-duty vehicles is expected to further drive the demand for air brake systems.

Company Profiles

Key players in the Europe Heavy Commercial Vehicle Air Brake Market include Aisin Corp, ZF Friedrichshafen AG, Continental AG, Robert Bosch GmbH, Cummins Inc, Knorr-Bremse AG, Nabtesco Corp, Haldex Group, Regal Rexnord Corp, COJALI S.L., TSE Brakes USA, and SORL Auto Parts, Inc. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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