Automotive Electro-Hydraulic Power Steering - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 150 pages | Mordor Intelligence

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Report description:

Automotive Electro-Hydraulic Power Steering Market Analysis

The automotive electro-hydraulic power steering market was valued at USD 16.89 billion in 2025 and is projected to reach USD 22.49 billion by 2030, equal to a 5.89% CAGR during the forecast period (2025-2030). This outlook stems from rising electric vehicle production, stricter global emissions rules, and growing requirements for steer-by-wire readiness that demand higher steering energy efficiency. Passenger car and light commercial vehicle electrification is lifting auxiliary 12 V loads, which improves the relative energy profile of on-demand EHPS pumps compared with belt-driven hydraulic systems. Autonomous driving programs call for fail-operational steering architectures, further reinforcing EHPS adoption. Rare-earth material constraints represent the main supply risk, while full electric power steering creates competitive pressure in smaller vehicle segments. Yet EHPS remains the bridge technology that pairs hydraulic force capability with electronic control flexibility, positioning suppliers to benefit across internal combustion, hybrid, and battery-electric platforms.

Global Automotive Electro-Hydraulic Power Steering Market Trends and Insights

Growing EV Production and Higher Auxiliary-12 V Loads

Escalating battery electric and plug-in hybrid volumes raise auxiliary loads for climate, infotainment, and safety functions, which amplifies the efficiency gap between on-demand EHPS pumps and continuously driven hydraulic pumps. Global EV sales reached 14 million units in 2024, with battery electric vehicles taking 73% of deliveries, creating a sizeable addressable base for EHPS

systems. Commercial segments follow a similar path as electric buses logged 30% shipment growth in 2024, encouraging the adoption of energy-saving steering solutions. The engineering priority now focuses on pump control algorithms coordinating with vehicle energy management to minimize current draw during steady-state cruising.

OEM Demand for Steering Redundancy for L3+ ADAS

Level 3 and above automated driving creates fail-operational steering requirements under ISO 26262, stipulating ASIL-D integrity for steering control. EHPS architecture, with its dual electric motor and hydraulic assist paths, delivers the redundancy and fault tolerance needed to maintain steerability during power interruptions or actuator faults. Recent production launches such as the steer-by-wire solution in NIO's ET9 highlight how EHPS modules pair with electronic actuation to achieve variable steering ratios and emergency intervention. Suppliers, therefore, align R&D toward diagnostics, sensor fusion, and fallback strategies that satisfy functional safety audits

Supply Chain Volatility of Rare-Earth Permanent Magnet Motors

Neodymium, dysprosium, and terbium supply remains concentrated in small mines, with China accounting for more than 60% of refined output. Export licensing changes in 2024 raised spot prices and strained inventory, prompting automakers to review magnet-free synchronous reluctance motors and to dual-source pump assemblies. Steering suppliers are lengthening safety stocks and entering direct offtake agreements with miners to stabilize lead times.

Other drivers and restraints analyzed in the detailed report include:

Rapid Electrification of Light Commercial Vehicles / Integration of Steer-By-Wire Modules With EHPS Pumps / Up-Front Cost Premium vs Conventional HPS /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Passenger cars commanded 64.31% of the electric hydraulic power steering market in 2024 on the strength of widespread adoption across compact, mid-size, and luxury platforms. Carmakers integrate EHPS to unlock stop-start compatibility, mild hybrid gains, and growing ADAS content. Electric hydraulic power steering market size for light commercial vehicles is projected to expand at a 7.27% CAGR because parcel fleets favor energy savings during urban duty cycles.

The passenger car share reflects efficient scale, model refresh cadence, and high configuration volumes that absorb the added cost of electronic pumps. Commercial vehicle programs show faster unit growth as final mile delivery regulations tighten in China, Europe, and several United States states. Heavy trucks and buses trail but represent future upside once battery pack economics and high voltage steering actuation converge.

Steering motors held 36.53% electric hydraulic power steering market share in 2024. Their high material value and critical performance role anchor the component mix. Sensors and torque modules will record a 7.73% CAGR through 2030, driven by ISO 26262 redundancy targets that double the number of position and torque sensing channels per system.

Permanent magnet brushless motors remain the industry standard because they deliver high power density and rapid response. Suppliers are investing in ferrite-based or reluctance designs to sidestep rare-earth exposure. Control ECUs migrate toward higher bandwidth microcontrollers as steer-by-wire software layers expand, while sealed pump housings incorporate integrated cooling jackets to extend duty cycles.

The Automotive Electro-Hydraulic Power Steering Market is Segmented by Vehicle Type (Passenger Cars, Light Commercial Vehicles, and More), Component Type (Steering Motors, Hydraulic Pumps, and More), Propulsion (Internal Combustion Engine, and More), Sales Channel (Original Equipment Manufacturer (OEM), Aftermarket), and by Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific remains the clear demand center. The region accounted for 47.57% electric hydraulic power steering market share in 2024 and is projected to expand at an 8.75% CAGR through 2030, making it the largest and fastest-growing territory. China's battery-electric and plug-in hybrid production scale drives high pump volumes. India's FAME-II and PLI schemes channel local sourcing toward domestic steer-by-wire and pump facilities. Japan contributes high-reliability sensors and motor controls that meet ISO 26262 targets for export models. Regional suppliers benefit from government incentives that lower landed costs and shorten supply chains for OEM plants clustered in Shanghai, Guangzhou, Chennai, and Nagoya.

North America follows with steady expansion as emissions rules tighten. The EPA's Multi-Pollutant Standards and California's Advanced Clean Cars II program compel automakers to electrify auxiliaries, including steering, to meet fleet targets. Battery-electric delivery van adoption has doubled since 2024, pulling EHPS content into parcel and grocery fleets. Domestic automakers also hedge rare-earth risk by funding ferrite and reluctance motor research, which supports regional electric hydraulic power steering market size resilience against supply shocks. Canada's clean-transport credits mirror United States policy and reinforce cross-border production synergies.

Europe anchors premium vehicle innovation. German, Swedish, and French brands are rolling out steer-by-wire platforms that integrate EHPS pumps as safety-redundant actuators, and ZF began series production for a Chinese luxury marque in early 2025. The European Union target of a 55% fleet-wide CO? cut by 2030 keeps pressure on suppliers to deliver efficiency gains at component level. As luxury and performance segments migrate to 800 V architectures, EHPS modules with smart energy-recovery algorithms complement brake-by-wire and active suspension systems. Eastern Europe and the Middle East provide emerging assembly bases, but infrastructure gaps and price sensitivity temper near-term penetration, positioning Asia-Pacific as the principal growth engine through the decade.

List of Companies Covered in this Report:

JTEKT Corporation / Robert Bosch GmbH / ZF Friedrichshafen AG / Nexteer Automotive Corporation / Mando Corporation / NSK Ltd. / Continental AG / Thyssenkrupp Presta AG / Hitachi Astemo / Showa Corporation / Knorr-Bremse Commercial Vehicle Systems GmbH / Shanghai OE Industrial Co., Ltd. (Brogen EV Solutions) /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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