

Automotive TPMS Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Autonomous Driving, ADAS & Safety (Automotive & Transportation)

> **Source:** <https://www.mordorintelligence.com/industry-reports/automotive-tpms-market>

> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
:---	:---
Base Market Size	USD 10.23 billion
Projected Forecast (2031)	USD 10.23 billion
Growth Rate (CAGR)	8.02 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Automotive TPMS industry](images/chart_2.png)

! [Automotive TPMS Market Size](images/chart_3.png)

! [Automotive TPMS Market Share by System Type, 2025](images/chart_4.png)

! [Automotive TPMS Market Share by Vehicle Type, 2025](images/chart_5.png)

! [Automotive TPMS Market Growth Rate by Region](images/chart_6.png)

! [Automotive TPMS Market Concentration](images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period
|
2020 - 2031
|

Market Size (2026)
|
USD 10.23 Billion
|

Market Size (2031)
|
USD 15.04 Billion
|

Growth Rate (2026 - 2031)
|
8.02 %
|

Fastest Growing Market
|
Asia-Pacific
|

Largest Market
|

North America
|

Market Concentration
|

Medium
|

Major Players

*Disclaimer: Major Players sorted in no particular order

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|

Market Overview

Automotive TPMS Market Analysis by Mordor Intelligence

The Automotive TPMS market size is projected to expand from USD 9.47 billion in 2025 and USD 10.23 billion in 2026 to USD 15.04 billion by 2031, registering a CAGR of 8.02% between 2026 and 2031. Direct sensor architectures led revenue in 2025, yet the Automotive TPMS market is already pivoting toward embedded modules and ultra-wideband frequencies as connected-vehicle stacks grow. Electrification is magnifying range-loss penalties from under-inflation, encouraging automakers to treat tire telemetry as a core energy-management input. Fleets are bundling TPMS data with predictive-maintenance dashboards, while insurers are beginning to link tire-pressure compliance to premium discounts. Cybersecurity rules promulgated by UNECE are raising the bar for sensor authentication while also opening avenues for suppliers to differentiate by certifying secure over-the-air update pipelines.

Key Report Takeaways

- * By system type, direct solutions led with 63.11% of the Automotive TPMS market share in 2025; indirect-to-direct hybrids are projected to post the fastest 8.17% CAGR through 2031.
- * By sensor technology, MEMS capacitive devices held 51.62% share of the Automotive TPMS market size in 2025, whereas piezoelectric technology is pacing an 8.23% CAGR to 2031.
- * By fitting method, valve-stem mounting accounted for 67.25% of the Automotive TPMS market in 2025, and embedded-tire modules are expanding at an 8.25% CAGR through 2031.
- * By frequency band, the 433 MHz class commanded 53.26% of the Automotive TPMS market share in 2025; 2.4 GHz + UWB frequencies are advancing at an 8.33% CAGR to 2031.
- * By vehicle type, passenger cars dominated the Automotive TPMS market with 71.79% of the market share in 2025, while two-wheelers are forecast to grow at an 8.19% CAGR through 2031.
- * By sales channel, OEM factory-fit installations accounted for 67.98% of the Automotive TPMS market in 2025, and the aftermarket retrofit route is growing at an 8.31% CAGR through 2031.
- * By geography, North America accounted for 36.81% of the Automotive TPMS market in 2025, and the Asia Pacific is growing at an 8.35% CAGR through 2031.

Key Market Trends

Market Trends and Insights

Drivers Impact Analysis of Automotive TPMS Market*

- Driver |
- (~) % Impact on CAGR Forecast |
- Geographic Relevance |
- Impact Timeline |

Mandated TPMS Fitment

+2.1%
|

Global, with enforcement peaks in EU, North America, China, India
|

Medium term (2-4 years)
|

Integration with Connected-Car Telematics Platforms

|

+1.8%
|

North America, EU, APAC (China, Japan, South Korea)
|

Long term (≥4 years)

|

Weight-Sensitive Range Anxiety

|

+1.5%
|

Global, concentrated in EU, China, North America EV corridors
|

Medium term (2-4 years)
|

Smart-Tire Health-Analytics

|

+1.2%
|

North America & EU fleet operators; APAC emerging
|

Long term (≥ 4 years)
|

Low-Cost MEMS Sensors

|

+0.9%
|

APAC core (India, China, Southeast Asia)

Short term (≤ 2 years)

Insurance-Telematics Incentives

|

+0.7%

North America, EU; pilot programs in APAC

Medium term (2–4 years)

Source: Mordor Intelligence
|

Competitive Landscape

Competitive Landscape

The Automotive TPMS market is poised for moderate consolidation, anchored by Continental, Sensata Technologies, Pacific Industrial, Huf, and DENSO. These leaders leverage deep OEM pipelines and global homologation portfolios to protect share. Continental's July 2024 agreement with Samsara demonstrates the pivot from one-off hardware sales to subscription analytics, exchanging gross margin for sticky software revenue. Sensata's recent report highlights its strong focus on research and development and its commitment to advancing electrification technologies for vehicles. The company has expressed a clear intent to enhance the capabilities of next-generation TPMS chips, showcasing its dedication to innovation and meeting the evolving needs of the automotive industry.

Second-tier contenders center on regional niches. Pacific Industrial dominates Japanese mini-vehicle fitment, while Huf supplies premium German brands that value lightweight clamp-in valves. Cybersecurity mandates under UNECE 155 invite specialty chipmakers that can embed hardware security modules into sensor ASICs, potentially disrupting the incumbent hierarchy. Meanwhile, tire manufacturers experiment with embedded modules to wrap data services into tire-as-a-service contracts, pressuring standalone sensor suppliers to prove added value beyond raw pressure readings.

Barriers to entry rest less on capital intensity and more on the scope of certification. ISO/SAE 21434 compliance audits and UN type-approval dossiers consume engineering bandwidth, deterring small firms. At the same time, aftermarket toolmakers eye retrofit growth, bundling TPMS diagnostics with broader OBD solutions. As ecosystems converge, the competitive narrative tilts toward software capabilities, cloud-to-edge encryption, and over-the-air update reliability rather than sensor bill of materials alone.

Automotive TPMS Industry Leaders

*

DENSO Corporation

*

Continental AG

*

Sensata Technologies (Schrader)

*

Huf Hülsbeck & Fürst

*

Pacific Industrial Co. Ltd.

*

*Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

This market covers the revenue generated from tire pressure monitoring systems used in road vehicles, including the hardware and electronics that detect pressure changes and send alerts to the driver or vehicle system.

Scope exclusions: It does not include tire sales, wheel and rim assemblies, or broader vehicle safety electronics that do not perform tire pressure monitoring.

Segmentation Container

*

By System Type

*

Direct

*

Indirect

*

Hybrid

*
By Sensor Technology

*
MEMS Capacitive

*
Strain-Gauge

*
Piezoelectric

*
Others (Optical, SAW, etc.)

*
By Fitting Method

*
Valve-Stem (Snap-In & Clamp-In)

*
Band / Rim-Mounted

*
Embedded-Tire Module

*
By Frequency Band

*
315 MHz

*
433 MHz

*
More than or equal to 2.4 GHz & UWB

*
By Vehicle Type

*
Passenger Cars

*
Commercial Vehicle

*
Two-Wheelers

*
By Sales Channel

*
OEM Factory-Fit

*
Aftermarket Retrofit

*
Geography

*
North America

*
United States

*
Canada

*
Rest of North America

*
South America

*
Brazil

*
Argentina

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Rest of South America

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Europe

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Germany

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United Kingdom

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France

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Italy

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Spain

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Russia

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Rest of Europe

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Asia-Pacific

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China

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Japan

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India

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South Korea

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Australia

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Rest of Asia-Pacific

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Middle East and Africa

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United Arab Emirates

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Saudi Arabia

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Turkey

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Egypt

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South Africa

*
Rest of Middle East and Africa

Frequently Asked Questions

What CAGR will TPMS revenues post between 2026 and 2031?

The Automotive TPMS market is forecasted to grow at an 8.02% CAGR from 2026 to 2031.

Which system type holds the largest revenue share in 2025?

Direct TPMS accounts for 63.11% of 2025 sales and remains the dominant architecture.

What makes embedded-tire modules attractive?

They eliminate external hardware, reduce theft risk, and enable tire makers to bundle data services throughout the tire lifespan.

How do cybersecurity rules affect TPMS suppliers?

UNECE 155 and ISO/SAE 21434 require secure key storage and encrypted messaging, adding certification costs but creating differentiation for compliant vendors.

Are retrofit kits gaining popularity?

Yes, aftermarket retrofit is expanding at 8.31% as older vehicles seek compliance and fleets tie pressure data into insurance telematics.