

ADAS and Autonomous Sensor Maintenance Equipment Market - A Global and Regional Analysis: Focus on Vehicle Type, Propulsion Type, Level of Autonomy, Product Type, and Country Analysis - Analysis and Forecast, 2022-2032

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Abstracts

The global ADAS and autonomous sensor maintenance equipment market was valued at \$2,704.7 thousand in 2022, and it is expected to grow at a CAGR of 49.68% and reach \$1,52,666.5 thousand by 2032. The growth in the global ADAS and autonomous sensor maintenance equipment market is expected to be driven by growing demand for autonomous driving and increasing focus on vehicle safety for semi-autonomous and autonomous vehicles.

Introduction of ADAS and Autonomous Sensor Maintenance Equipment

The autonomous vehicle ecosystem is growing fast, with new sensors and autonomous driving technologies moving autonomous vehicles to new levels of driving capabilities. These technologies have their advantages as well as disadvantages. These sensors provide the necessary perception capabilities required for autonomous vehicle operations, and the readings or information captured by these sensors need to be reliable and fast. At times, due to sensor contaminants present on the sensor surface, the information generated by sensors becomes inaccurate or unreliable, leading to improper functioning or malfunctioning of autonomous vehicles. ADAS and autonomous sensor maintenance equipment remove the contaminants from the surface of sensors and keep them clean, thereby helping sensors to generate accurate data for the computer to process.

Market Introduction

The global ADAS and autonomous sensor maintenance equipment market is in a growth phase, wherein the number of companies offering ADAS and autonomous sensor maintenance solutions is increasing rapidly. Latest technological advancements in autonomous driving technologies and the growing number of sensors in vehicles are boosting the adoption of ADAS and autonomous sensor maintenance solutions across the globe. Moreover, autonomous vehicles are increasingly growing in demand, owing to benefits such as increased vehicle and driver safety features, enhanced fuel/battery power efficiency, no road traffic congestion, and accessibility to driving for all, including people with certain disabilities and others. Vehicles equipped with level 1 and level 2 autonomous driving capabilities are already on roads in most of the automotive markets. With significant demand for ADAS and autonomous sensor maintenance solutions being anticipated over the coming years during the forecast period, primarily from automotive original equipment manufacturers (OEMs) and autonomous vehicle-based business operations, the market competition is expected to grow considerably among established and emerging ADAS and autonomous sensor maintenance equipment providers in the ADAS and autonomous sensor maintenance equipment industry.

Industrial Impact

The global ADAS and autonomous sensor maintenance equipment market is driven by several factors, such as rising demand for vehicles equipped with autonomous driving capabilities and growing concerns for vehicle safety in these vehicles (vehicles equipped with autonomous driving capabilities).

Autonomous vehicles are increasingly growing in demand, owing to benefits such as increased vehicle and driver safety features, enhanced fuel/battery power efficiency, no road traffic congestion, and accessibility to driving for all, including people with certain disabilities and others. Vehicles equipped with level 1 and level 2 autonomous driving capabilities are already on roads in most of the automotive markets. Some developed markets have also launched or planned to launch vehicles with level 3 autonomy this year (2023). The autonomous vehicle industry has also witnessed a rapid growth of autonomous driving companies, such as Waymo LLC, Cruise LLC, and Zoox, Inc., over the past five years (2018-2023). Most of these companies have identified robotaxis as the most viable option for introducing autonomous vehicles in a profitable and sustainable manner. The growing number of autonomous vehicles, coupled with an increasing number of sensors in these vehicles, are expected to drive the demand for ADAS and autonomous sensor maintenance equipment multi-fold. Anticipating the large-scale launch of level 3, level 4, and level 5 autonomous vehicles in the near future,

ADAS and autonomous sensor maintenance equipment providers have already started working on sensor maintenance equipment for all kinds of autonomous vehicles, ranging from level 1 to level 5. These ADAS and autonomous sensor maintenance equipment providers plan to have the sensor maintenance equipment ready for the automotive OEMs or autonomous driving technology companies when the vehicles are launched. The growth of the global ADAS and autonomous sensor maintenance equipment market largely depends on the launch of these autonomous vehicles and their adoption across various major markets. In the current market scenario, the market growth is held back either due to a lack of regulatory framework for autonomous vehicles, lack of infrastructure, or lack of interest from the end-user customers. This market scenario is expected to change for the good and help drive the growth of the market in the coming years during the forecast period.

Market Segmentation:

Segmentation 1: by Vehicle Type

Passenger Vehicles

Commercial Vehicles

Robotaxis

Passenger Vehicles to Dominate the Global ADAS and Autonomous Sensor Maintenance Equipment Market

On the basis of vehicle type, the global ADAS and autonomous sensor maintenance equipment market has been categorized into passenger vehicles, commercial vehicles, and robotaxis. Among the three vehicle types, the passenger vehicles segment is expected to have the fastest growth during the forecast period. The passenger vehicles segment is expected to continue dominating the market during the forecast period. Most of the developments in autonomous driving technologies are being witnessed in the passenger vehicles segment, as automotive OEMs continue to work on the development of passenger vehicles with higher levels of autonomy. At present, the majority of the passenger vehicles being sold by automotive OEMs across the world have a variety of sensors equipped in them. Most of these passenger vehicles have basic ADAS features, such as adaptive cruise control (ACC), lane departure warning, automatic emergency braking, and parking assist. Although currently, most passenger

vehicles have level 1 and level 2 autonomy, passenger vehicles are expected to have up to level 4 autonomy in the near future under normal circumstances. Commercial vehicles and robotaxis are also likely to witness significant growth in terms of revenue generation in the coming years during the forecast period.

Segmentation 2: by Propulsion Type

Electric Vehicle (EV)

Internal Combustion Engine (ICE) Vehicle

Electric Vehicle to Lead the Global ADAS and Autonomous Sensor Maintenance Equipment Market

Based on the propulsion type, the global ADAS and autonomous sensor maintenance equipment market has been segmented into electric vehicles and internal combustion engine vehicles. As the automotive industry is currently being driven by electrification and autonomous driving technologies, the demand for sensor maintenance equipment for electric vehicles is likely to be higher as compared to their internal combustion engine counterparts. Automotive OEMs are increasingly focusing on the development of electric vehicle offerings that come with autonomous driving technologies.

With the automotive industry moving toward connected, autonomous, and electric vehicle offerings and ambitious vehicle electrification plans in most of the developed and developing economies, electric propulsion type and autonomous vehicles are likely to converge in the coming years. Electric vehicles have their inherent benefits in the form of reduced “fuel costs” and lesser environmental impact. Moreover, with the evolution of autonomous vehicles and the growing integration of sensors, it will be relatively easier to implement intricate autonomous driving technologies in electric vehicles. Therefore, the electric vehicle segment is expected to grow at the fastest rate during the forecast period.

Segmentation 3: by Level of Autonomy

Level 1

Level 2

Level 3

Level 4

Level 5

Level 3 to be Dominant in the Global ADAS and Autonomous Sensor Maintenance Equipment Market

Based on the level of autonomy, the global ADAS and autonomous sensor maintenance equipment market has been categorized into level 1, level 2, level 3, level 4, and level 5. Among the five levels of autonomy (level 1 to level 5), the demand for sensor maintenance equipment for vehicles with level 3 autonomy is expected to be the highest by 2032. Much of this can be ascribed to the growing number of vehicle models with level 3 autonomy and increasing penetration of level 3 autonomy in new vehicle models by leading automotive OEMs.

Level 3 automated driving is where the OEMs move from driver support features to automated driving features. These automated driving features can drive the vehicle only under certain limited conditions. In the next couple of years (2023-2025), level 3 automated driving is expected to gain wider significance and adoption as the automotive OEMs continue to work with various stakeholders in the autonomous vehicle ecosystem to push and drive the large-scale adoption of this driving technology.

Segmentation 4: by Product Type

Fluids

Fluids and Wiper Blade

Fluids and Air Jet

Others

Fluids and Air Jet to Have the Largest Share in the Global ADAS and Autonomous Sensor Maintenance Equipment Market

On the basis of product type, the global ADAS and autonomous sensor maintenance equipment market has been segmented into fluids, fluids and wiper blade, fluids and air jet, and others. The fluids and air jet segment is expected to witness significant growth during the forecast period and is likely to become the dominant segment by 2032. Fluids and air jet sensor maintenance equipment are increasingly being seen as the most feasible sensor maintenance equipment among other product types by automotive OEMs and autonomous vehicle-based businesses. As the number of sensors continues to grow in new autonomous vehicle models being offered by automotive OEMs, other existing sensor maintenance equipment such as fluids and fluids and wiper blade are becoming less effective owing to their more complex design, making fluid and air jet the most preferred option among various product types. The sensor-cleaning solution providers consider fluids and air jet as one of the most effective sensor-cleaning solutions for vehicles of today. They are consistently trying to improve their fluids and air jet-based sensor cleaning solutions by optimizing the design in terms of cleaning fluid usage and selective sensor cleaning, which reduces the need for a large cleaning fluid tank.

Segmentation 5: by Region

North America: U.S., Canada, and Mexico

Europe: Germany, Spain, France, Italy, and Rest-of-Europe

U.K.

China

Asia-Pacific and Japan: Japan, South Korea, India, and Rest-of-Asia-Pacific and Japan

Rest-of-the-World

The global ADAS and autonomous sensor maintenance equipment market is expected to witness significant growth in the coming years, with major contributions from North America, China, and Europe regional markets. In terms of revenue generation, the North America market is one of the key regions in the global ADAS and autonomous sensor maintenance equipment market. Much of this can be attributed to comparatively faster testing and adoption of new sensor maintenance equipment technology and the

growing number of autonomous vehicle-based businesses in the region. However, China and the Asia-Pacific and Japan regions are likely to be among the regions with the highest growth in the coming years during the review period. With China being the largest vehicle manufacturer and increasing integration of advanced autonomous driving technologies into newer vehicle models by automotive OEMs, the need for sensor maintenance equipment is likely to be the highest here among all the other regions.

Recent Developments in the Global ADAS and Autonomous Sensor Maintenance Equipment Market

In March 2023, Kautex Textron GmbH & Co. KG announced the opening of its new plant in Tianjin (China). This is the company's seventh plant in China. The company aims to manufacture clear vision systems and fuel systems at this plant while continuing to expand its growth in the country.

In January 2023, Cebi Group launched the latest generation sensor cleaning system for new mobility applications. The product has the capacity to hold a liquid volume of up to 12 liters with multi-level liquid sensing capacity. This is a patented acoustic decoupling system with the elimination of structural noise transfer to the vehicle body.

In December 2022, Actasys Inc entered into a collaborative agreement with Wideye, a subsidiary of AGC Group specializing in sensor glass solutions, to pursue together their customers in the automotive industry and offer sensor cleaning solutions for ADAS and autonomous vehicle applications.

In August 2022, Actasys Inc announced that it had signed a memorandum of understanding (MoU) with Webasto SE, a German company specializing in roof systems. Under this agreement, the roof sensor module (RSM) of Webasto SE would be integrated with the sensor cleaning systems of Actasys Inc to ensure the functionality of the RSM under harsh environmental and weather conditions.

Demand – Drivers, Limitations, and Opportunities

Market Demand Drivers:

Growing Demand for Autonomous Driving: With the growing adoption of autonomous

vehicles, the demand for sensor maintenance equipment is also expected to grow proportionally. For ADAS and autonomous driving applications, three types of sensors are primarily used, namely camera, radar, and LiDAR. At present, most of the level 1 and level 2 vehicles on the road are equipped with cameras and radar systems. These vehicle sensors offer features, such as lane keeping assist, traffic jam assist, and adaptive cruise control, which are increasingly being desired by the end users or customers of automotive OEMs. For the sensors to perform properly, sensor contaminants need to be removed or cleaned off from the surface of the sensors. Thus, it can be said that the growing demand for autonomous driving is driving the growth of the global ADAS and autonomous sensor maintenance equipment market.

Increasing Focus on Vehicle Safety for Semi-Autonomous and Autonomous Vehicles: Vehicle safety remains one of the major benefits of automation in vehicles. At present, vehicle users/drivers have a lower level of automation in their vehicles which assists them by perceiving the vehicle surroundings and then generating actionable insight for the driver or performing the action itself based on the perception. Higher levels of vehicle automation, level 4 and level 5, are expected to be in vehicles in the near future. The integration of sensors in vehicles has been the strategy of automotive OEMs toward reduction of computing time and improving the accuracy of the vehicle surrounding data for their semi-autonomous and autonomous vehicle offerings in production or development. Sensor maintenance equipment is required to enable the safe and optimal operation of these vehicle sensors through fast and efficient cleaning of sensor contaminants. The safety of vehicles largely depends on the reliable performance of sensors, which is enabled by sensor maintenance equipment.

Market Challenges:

Optimization of Cleaning Fluid Usage: Vehicle safety systems in today's vehicles have become more complex than ever, generating large volumes of data. But sensors used in these safety systems often get contaminated due to dirt, snow, and other environmental contaminants. These contaminants are cleaned using a sensor cleaning system for the effective operation of sensors and safety systems. These sensor cleaning systems primarily comprise a cleaning fluid system and air-jet/wiper blade to dry the sensor surface on which the cleaning fluid gets sprayed. The cleaning fluid system adds weight to the vehicle; the larger the cleaning fluid system, the more weight it adds to the vehicle. As a result, the ADAS and autonomous sensor cleaning system providers are working on the optimization of cleaning fluid usage. In order to keep the usage of cleaning fluid to a minimum, these sensor maintenance equipment providers are working on zone cleaning, where the cleaning fluid is precisely sprayed on the

sensor that needs to be cleaned without actuating all the areas.

System Design-Related Challenges: The cleaning system design around the location of the physical installation of sensors is a crucial part of the ADAS and autonomous sensor maintenance equipment. Automotive OEMs and sensor cleaning equipment providers are working toward understanding the operation of sensors in various surroundings/conditions and the design optimization of associated sensor cleaning systems. It all started with cleaning fluid being simply sprayed on sensors to clean the sensor surface. To remove or dry the droplets of cleaning fluid hindering the view of sensors, wiper blades and air-jet systems were added. With the growing number of sensors in vehicles, the design of such a sensor-cleaning system is likely to be challenging for sensor-cleaning equipment providers.

Market Opportunities:

Increasing Focus on Technological Advancements in Sensor Maintenance Equipment: The global ADAS and autonomous sensor maintenance equipment market is being primarily shaped by technological advancements in sensor cleaning systems in line with vehicles with higher levels of vehicle automation. With automotive OEMs equipping their vehicle offerings with more sensors than ever, the need for technologically advanced sub-systems for keeping these sensors clear of contaminants or obstructions is also on the rise. Industry experts expect the rollout of autonomous vehicles with level 4 and level 5 autonomy within this decade (2020-2030). At present, sensor maintenance equipment or solution providers are working on bolstering their technological capabilities and collaborating with other stakeholders to develop products for the current and future needs of the global ADAS and autonomous sensor maintenance equipment market.

Sensor Cleaning Solutions for Highly and Fully Automated Vehicles: With automotive OEMs pushing toward the development and commercialization of highly and fully automated vehicles, L4 and L5, the number of sensors used in vehicles is expected to grow significantly, including cameras, radars, LiDAR, global positioning systems (GPS), and inertial measurement unit (IMUs). As per industry experts, the number of sensors in L4 vehicles can increase up to 60. Depending upon the design, number, and location of these sensors in L4 and L5 vehicles, the automotive OEMs will require new and improved sensor cleaning solutions for the sensors in their vehicles to perform reliably. Moreover, the automotive OEMs will be looking for sensor cleaning solutions with modular designs that can be scaled depending on the number of sensors and sensor utilization in their vehicles.

How can this report add value to an organization?

Product/Innovation Strategy: Globally, the leading automotive OEMs are continuously working to manufacture and sell vehicles with higher autonomous driving capabilities, i.e., level 3 and above. The growing need for affordable and high-performing ADAS and autonomous sensor maintenance equipment is one of the major factors for the growth of the global ADAS and autonomous sensor maintenance equipment market. The market is more on the consolidated side at present, where global ADAS and autonomous maintenance equipment providers have been successful to a certain extent in strengthening their market position in the global market, with a few automotive OEMs and autonomous vehicle businesses working on such solutions in-house. However, with the rise of autonomous driving, the existing established players are expected to face stiff competition from emerging players. Moreover, partnerships and collaborations are expected to play a crucial role in strengthening market position over the coming years, with the companies focusing on bolstering their technological capabilities and gaining a dominant market share in the ADAS and autonomous sensor maintenance equipment industry.

Growth/Marketing Strategy: The global ADAS and autonomous sensor maintenance equipment market has been growing at a rapid pace. The market offers enormous opportunities for existing and emerging market players. Some of the strategies covered in this segment are mergers and acquisitions, product launches, partnerships and collaborations, business expansions, and investments. The strategies preferred by companies to maintain and strengthen their market position primarily include partnerships, agreements, and collaborations.

Competitive Strategy: The key players in the global ADAS and autonomous sensor maintenance equipment market analyzed and profiled in the study include ADAS and autonomous sensor maintenance equipment providers that develop, maintain, and market ADAS and autonomous sensor maintenance equipment. Moreover, a detailed competitive benchmarking of the players operating in the global ADAS and autonomous sensor maintenance equipment market has been done to help the reader understand the ways in which players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Of the top players profiled in the report, the private companies operating in the global ADAS and autonomous sensor maintenance equipment market accounted for around 67% of the market share in 2021, while the public companies operating in the market captured around 33% of the market share.

Key Companies Profiled:

Private Companies

Actasys Inc

ARaymond

Exotic Automation & Supply

Ficosa Internacional SA

Waymo LLC

R?chling SE & Co. KG

MS Foster & Associates, Inc.

Motion Controls international

Mingshang Technology Co., Ltd.

Kautex Textron GmbH & Co. KG

dIhBOWLES

Helbako GmbH

PASS GmbH & Co. KG

Cebi Group

Public Companies

Continental AG

Valeo

Kendrion N.V.

Ford Motor Company

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