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Automotive Integrated Antenna System Market - A Global and Regional Analysis: Focus on Component, Antenna Type, Antenna Design, Connectivity, Frequency, Placement, Vehicle Type, and Region - Analysis and Forecast, 2022-2031

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Abstracts

Automotive Integrated Antenna System Market Industry Overview

The global automotive integrated antenna system market is projected to reach $2,426.9 million by 2031 from $913.6 million in 2021, growing at a CAGR of 10.28% during the forecast period 2022-2031. The growth in the automotive integrated antenna system market is expected to be driven by technological advancements and increasing demand for advanced driver assistance systems (ADAS).

Market Lifecycle Stage

Globally connected vehicles are moving the automotive industry into a new era. Vehicles are being deployed with extensive sensor platforms that generate vast amounts of data from different systems, such as LIDAR, telematics control units, or OBD-II interfaces. At the same time, the advent of 5G and underlying low latency, high bandwidth V2X technology is enabling dozens of new automotive use cases.

The automotive industry has been undergoing dynamic changes in recent years due to factors such as declining fuel prices, low industry growth rate, the emergence of electric and hybrid electric vehicles, improvement in automotive credit availability, aging vehicle fleet, and last but not least, the emergence of disruptive trends such as car sharing and ride-hailing services globally.

Impact

The automotive integrated antenna system market is driven by several factors, such as increasing production and sales of electric cars, growing implementation of 5G networks, and increasing demand for PMICs in advanced driver assistance systems (ADAS).

The gradual development in technological offerings is one such strategy adopted by major OEMs to gain significant market share in the established automotive markets. New applications, such as vehicle-to-everything (V2X), advanced driver assistance systems (ADAS), firmware-over-the-air (FOTA), diagnostics, real-time maps, etc., require a larger data flow in and out of a vehicle. As a result, the amount and variety of antennas have increased tremendously. For optimal performance of an antenna system, location and surrounding conditions are critical.

With more and more antennas being integrated into vehicles, finding suitable packaging and location solutions is becoming ever more of a challenge. There are many positions possible to place antennas on a vehicle, but not all are good for each type of car. For good reception of wireless systems, there are a number of factors to be considered.

Impact of COVID-19

COVID-19 caused disruptions in the supply chain of the semiconductor industry. It had short-term and long-term effects on the automotive integrated antenna system market. The environment for semiconductor operations is quite complex. For assembly, testing, packing, and equipment, suppliers and partners around the world need a lot of raw materials. Increased use of the internet is benefiting the automotive integrated antenna system market. Since the market is predominantly driven by expanding car sales and production, the influence of the COVID-19 pandemic on the automotive integrated antenna system market was unavoidable. Due to the repeated lockdowns and shutdowns of manufacturing units, car output and sales grew slowly in various parts of the world.

Market Segmentation:

Segmentation 1: by Vehicle Type

Passenger Vehicles

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Commercial Vehicles

The passenger vehicles segment accounts for largest share of the automotive integrated antenna system market. Rise in the sale of connected vehicles, passenger vehicles with infotainment systems, and autonomous vehicles is driving the segment growth.

Segmentation 2: by Antenna Type

Planar Antenna

Non-Planar Antenna

The planar antenna segment accounts for the largest share of the automotive integrated antenna system market. In automotive sensing applications, planar antennas are gaining popularity due to their low cost, low profile, and ease of integration with host systems.

Segmentation 3: by Component

Telematics Control Unit (TCU)

Antennas

Cables

Data Connectors

The telematics control unit segment accounts for highest share of the automotive integrated antenna system market.

Segmentation 4: by Antenna Design

Shark-Fin Antenna (without TCU)

Antenna Farm (Without TCU)

Antenna Farm with TCU

TCU Box with Integrated Antenna

Antenna Farm with Slim TCU

The Shark-Fin Antenna (Without TCU) segment accounts for the largest share of the automotive integrated antenna system market. These antennas are growing in popularity because they are more resilient, aesthetically pleasing, and functional.

Segmentation 5: by Connectivity

GNSS/GPS

WiFi-Bluetooth

Cellular

Others

The WiFi-Bluetooth segment accounts for the largest share of the automotive integrated antenna system market. The increase in the demand of wireless technology drives the WiFi-Bluetooth segment growth.

Segmentation 6: by Frequency

High Frequency

Very High Frequency

Ultra-High Frequency

The high frequency segment accounts for the largest share of the automotive integrated antenna system market due to an increase in shipment of the conventional and connected cars globally.

Segmentation 7: by Region

North America

Europe

China

Asia-Pacific and Japan

Rest-of-the-World

North America is currently one of the most competitive markets in the automotive integrated antenna system market. The North America region comprises the U.S. and Canada. The presence of technology providers, minimal miscalculations, product customization, and reduced production timescale are the primary driving factors of the North America automotive integrated antenna system market.

Recent Developments in the Automotive Integrated Antenna System Market

In June 2022, Renesas Electronics Corporation launched the ISL78083, a integrated antenna system (PMIC) aimed at simplifying power supply design for use in multiple HD camera modules, reducing development cycles, bill of materials (BOM) cost, and supply chain risks.

In June 2021, Microchip expanded its broad portfolio of dsPIC33C DSCs to cover the large memory segment with the new ISO 26262-compliant dsPIC33CK1024MP7xx family. This new family of dsPIC33C DSCs with 1 MB Flash enables applications running automotive software such as AUTOSAR, OS, MCAL drivers, ISO 26262 functional safety diagnostics, and security libraries. The family of dsPIC33 DSCs also includes a high-performance central processing unit (CPU) with a deterministic response and specialized peripherals for general automotive, advanced sensing and control, digital power, and motor control applications.

In April 2021, STMicroelectronics launched a new fully integrated integrated antenna system (PMIC) for AMOLED displays that combine a low quiescent

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current and enhanced flexibility to extend the battery runtime of portable devices.

In April 2021, Infineon Technologies AG introduced a new family of battery management ICs, including TLE9012DQU and TLE9015DQU. The ICs enable an optimized solution for battery cell monitoring and balancing. The devices are suitable for a wide range of industrial, consumer, and automotive applications, such as mild hybrid electric vehicles (MHEV), hybrid electric vehicles (HEV), plug-in hybrid electric vehicles (PHEV), and battery-powered electric vehicles (BEV).

Demand – Drivers and Limitations

Following are the demand drivers for the automotive integrated antenna system market:

Increasing Sales of Electric and Autonomous Vehicles

Increasing Focus on Vehicle Safety

The market is expected to face some limitations as well due to the following challenge:

Conflict between Requirements for Smaller Device Size and Larger Antenna Bandwidth

How can this report add value to an organization?

Product/Innovation Strategy: Increasing demand for cooling of batteries and high-temperature parts in electric vehicles is boosting the growth of the automotive integrated antenna system market. Therefore, the automotive integrated antenna system market business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The automotive integrated antenna system market is an exponentially growing market holding enormous opportunities for the market players. Some of the strategies covered in this segment are product launches, partnerships and collaborations, business expansions, and investments. The companies' preferred strategy has been product launches, partnerships, and collaborations to strengthen their positions in the global automotive integrated antenna system market.

Competitive Strategy: Key players in the automotive integrated antenna system market analyzed and profiled in the study involve automotive integrated antenna system market-based product manufacturers that provide raw or processed products. Moreover, a detailed competitive benchmarking of the players operating in the automotive integrated antenna system 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.

The top segment players who are leading the automotive integrated antenna system market include private companies that capture around 30% of the market share, whereas public companies in the market capture around 70% of the market share.

Key Companies Profiled

- TE Connectivity
- Ficosa International S.A.
- Continental Automotive
- Harada Industry Co. Ltd.
- Taoglas
- Denso Corporation
- Kathrein Solutions GmbH
- Rohde and Schwarz GmbH & Co KG

Yokogawa Electric Corporation

Antcom Corporation

Laird Connectivity

AGC Automotive

ACE Technologies Corporation

FIAMM Componenti Accessori - F.C.A.

Mistral Solutions Pvt. Ltd.

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