

Automotive LiDAR System-on-Chip (SoC) Market - A Global and Regional Analysis: Focus on Vehicle Type, Propulsion Type, Level of Autonomy, Range Type, Perception Type, and Country-Level Analysis - Analysis and Forecast, 2024-2033

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Abstracts

Automotive LiDAR System-on-Chip (SoC) Overview

The automotive LiDAR system-on-chip (SoC) market is expected to be valued at \$29.3 million in 2024, which is anticipated to grow at a CAGR of 24.30% and reach \$207.5 million by 2033. The growth in the automotive LiDAR system-on-chip (SoC) market is expected to be driven by technological advancements in autonomous vehicles and extensive use of LiDARs in highly automated vehicles, tremendous advancement in automotive LiDAR research and development (R&D) to improve the features of the LiDAR system, and an anticipated decline in LiDAR manufacturing costs after the start of mass production.

Market Lifecycle Stage

Automotive LiDAR system-on-chip (SoC) is a crucial component in the development of autonomous vehicles as well as for the success of vehicle suppliers and manufacturers. One of the main factors influencing the growth of the automotive LiDAR system-on-chip industries for autonomous vehicles is the increased need for their safety and efficiency. The autonomous vehicle sector must also adhere to stringent restrictions as well as national and international safety mandates. Autonomous vehicle development is expected to increase over the coming years, creating lucrative opportunities for those manufacturing LiDAR system-on-chip systems for these vehicles.

The automotive LiDAR system-on-chip (SoC) market is in the growth phase. The implementation of automotive LiDAR system-on-chip is increasing in semi-autonomous and fully autonomous vehicles. As a result, the automotive LiDAR system-on-chip (SoC) market is expected to flourish in the forecast period 2024-2033.

Impact

Growing autonomous vehicle demand in developing markets, stringent regulatory requirements imposed by governments on the autonomous vehicle industry, and consistently increasing instances of vehicle recall due to safety failure are all driving this market's expansion. Furthermore, the increasing introduction of autonomous cars, rising customer perception of product quality and safety, and incorporation of technology advances with the rising adoption of safety devices in the autonomous vehicle industry are all providing opportunities for market players to expand.

Impact of COVID-19

The overall automotive LiDAR market has been impacted by the COVID-19 pandemic as a result of the delay in technology developments and suspension of vehicle production. In addition, nation-specific regulations for automotive LiDAR technology have an impact on the market's growth.

Due to the quick spread of the COVID-19 virus, which had a significant impact on the market, the government's financing priorities have changed because of the global economic slump, which has hampered the development of new automotive LiDAR system-on-chip projects. The crisis has put a lot of pressure on automakers to prioritize projects that have the best chance of being profitable and to cut costs through cost-cutting and value-chain-wide efficiencies.

Market Segmentation:

Segmentation 1: by Vehicle Type

Passenger Cars

Commercial Vehicles

Robo Taxis

The automotive LiDAR system-on-chip (SoC) market based on the vehicle type segment is expected to be dominated by the passenger cars segment throughout the forecast period 2024-2033.

Segmentation 2: by Propulsion Type

Electric Vehicles

Internal Combustion Engine Vehicles

The automotive LiDAR system-on-chip (SoC) market based on the propulsion type is expected to be dominated by the electric vehicle segment throughout the forecast period.

Segmentation 3: by Level of Autonomy

Semi-Autonomous

Fully Autonomous

The automotive LiDAR system-on-chip (SoC) market based on the level of autonomy segment is expected to be dominated by the semi-autonomous segment throughout the forecast period.

Segmentation 4: by Range Type

Short-to-Medium Range LiDAR

Medium-to-Long Range LiDAR

Based on range type, the medium-to-long range LiDAR segment is expected to dominate the market owing to its high resolution, long-range, and broad field of view.

Segmentation 5: by Perception Type

2D and 3D

4D

Based on perception type, the 4D segment is one of the fastest-growing segments due to its high performance and reasonable price. However, the 2D and 3D segment is likely to dominate the market, offering a wide scope of development in the forecast period.

Segmentation 6: by Region

North America

Europe

U.K.

China

Asia-Pacific and Japan

Rest-of-the-World

North America is home to several automotive LiDAR system-on-chip manufacturers as well as automotive LiDAR manufacturers. The region is expected to dominate the automotive LiDAR system-on-chip (SoC) market during the forecast period.

Recent Developments in the Automotive LiDAR System-on-Chip (SoC) Market

In November 2022, Aeva Inc. expanded its presence internationally with the hiring of new teams in Germany, India, and Thailand, as well as the appointment of industry veteran Clement Kong to oversee sales in the Asia-Pacific region. The new teams will assist in sales, technological development, and production to hasten the advancement of Aeva Inc.'s 4D LiDAR's next-generation technology and strengthen customer relations in the Europe and Asia-Pacific regions.

In May 2022, SiLC Technologies, Inc. collaborated with AutoX Inc., which is the leader in China's robo-taxi market, to deploy SiLC's Eyeonic Vision Sensor for

its fleet of robotic taxis.

In December 2021, indie Semiconductor, Inc. launched the Surya LiDAR system-on-a-chip (SoC) that provides advanced driver assistance systems and autonomous driving features.

Demand – Drivers and Limitations

Following are the demand drivers for the automotive LiDAR system-on-chip (SoC) market:

Rapid Technological Advancement in LiDAR in the Automotive Industry

Surge in Investments and Funding in LiDAR System-on-Chip Manufacturing Startups for R&D Activities

Cost-Effectiveness of LiDAR System-on-Chip

Growing Demand for the Miniaturization of Products

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

Growing Complexity in Integrating All the Components on a Chip Due to Lack of Knowledge

Constant Review of Regulatory Policies on Standardization of Chips

Semiconductor Shortage Effect

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different applications of the automotive LiDAR system-on-chip (SoC) products available based on vehicle type (passenger cars, commercial vehicles, and robo taxis), propulsion type (electric vehicles, internal combustion engine vehicles), level of autonomy (semi-autonomous, fully autonomous), range type (short-to-medium range

LiDAR and medium-to-long range LiDAR), and perception type (2D and 3D, and 4D). Increasing demand for safety and autonomy is pushing the consumption of automotive LiDAR system-on-chip (SoC). Therefore, the automotive LiDAR system-on-chip business is a high-investment and high-revenue generating model.

Growth/Marketing Strategy: The automotive LiDAR system-on-chip (SoC) market will be an exponentially growing market holding enormous opportunities for the market players. Some strategies covered in this segment are product launches, market developments, partnerships and collaborations, business expansions, and investments. The companies' preferred strategy has been product development and partnerships and collaborations for the mass production of products, which enable them to strengthen their positions in the global automotive LiDAR system-on-chip (SoC) market.

Competitive Strategy: Key players in the global automotive LiDAR system-on-chip (SoC) market analyzed and profiled in the study involve automotive LiDAR system-on-chip (SoC) manufacturers, automotive LiDAR manufacturers, and autonomous vehicle manufacturers. Moreover, a detailed competitive benchmarking of the players operating in the global automotive LiDAR system-on-chip (SoC) market has been done to help the reader understand how 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 competitive landscape of the automotive LiDAR system-on-chip (SoC) market includes different strategies undertaken by automotive LiDAR system-on-chip manufacturers to gain market presence. Some strategies adopted by them include new product launch and development activities, market development activities, partnerships, collaborations, joint ventures, and mergers and acquisitions. Among all the strategies adopted, product development activities have dominated the competitive landscape and are the most widely adopted strategies among manufacturers.

Key Companies Profiled

Type 1 Companies: Automotive LiDAR System-on-Chip (SoC) Manufacturers

indie Semiconductor, Inc.

Mobileye

RoboSense

Ouster, Inc.

Aeva Inc.

SiLC Technologies, Inc.

Scantinel

Voyant Photonics, Inc.

Type 2 Companies: Automotive LiDAR Manufacturers

Quaenergy Systems, Inc.

Velodyne Lidar, Inc.

Innoviz Technologies Ltd

Luminar Technologies, Inc.

Type 3 Companies: Autonomous Vehicle Manufacturers

General Motors

Volkswagen AG

Ford Motor Company

BMW Group

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