

# Global ADAS High Definition Locator Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on ADAS High Definition Locator competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. ADAS high-definition positioners are specialized devices that integrate high-precision GNSS, IMU, and wheel speedometer sensors, achieving centimeter-level vehicle positioning through fusion algorithms. They provide continuous and reliable position, attitude, and heading information to autonomous driving systems, ensuring precise lane-keeping. They are a core component for Level 2+ and higher intelligent driving capabilities. In 2024, the global ADAS high-definition positioner market will have a unit price of US\$162 per unit, with sales of approximately 20.87 million units, an average single-line production capacity of 100,000 to 200,000 units, and an industry profit margin of 20% to 30%.

### Regional Market Landscape

The global market is characterized by a three-way, rapidly growing market: North America and Europe: As technology hubs and standard setters, their markets are highly mature. These markets are primarily driven by stringent automotive safety regulations (such as the EU Global Standards and Regulations) and the pursuit of advanced intelligent driving by leading automakers (such as Tesla, BMW, and Mercedes-Benz). China: The world's largest and fastest-growing market. Its uniqueness lies in fierce domestic competition, strong government support for "intelligent connected vehicles," and a well-developed Beidou satellite navigation system ecosystem. The market is dominated by local suppliers and foreign participation. Other regions in the Asia-Pacific region (Japan and South Korea, etc.): Japanese and South Korean automakers (such as Toyota and Hyundai) are relatively conservative but steadily advancing, with the market being served by both local giants (such as Denso and Hyundai Mobis) and international suppliers.

### Upstream and Downstream Supply Chain

Upstream (core component and data suppliers):

Chip/Module: u-blox, STMicroelectronics, Qualcomm, Trimble, NovAtel, etc. provide high-precision GNSS chips and IMU modules. High-precision maps: HERE, TomTom, Baidu, AutoNavi, and NavInfo are core data providers. Enhanced services: Operators provide differential correction services such as RTK/PPP. Downstream (typical customers): OEMs: All passenger and commercial vehicle manufacturers developing L2+ and higher autonomous driving capabilities. Robotaxi/Robobus operators: Waymo, Cruise, Baidu Apollo, WeRide, etc. High-precision map collectors: Their collection vehicles are already major users of HD positioners. Technology Trends and Innovations Deep Fusion and Perception-Assisted: Positioning is evolving from "GNSS+IMU" combined navigation to deeper integration with camera visual odometry and LiDAR odometry. This leverages environmental features to compensate for satellite signal deficiencies and significantly improves robustness in complex urban scenarios. Cloud-based collaboration and "Positioning as a Service": Receiving cloud-based differential correction data and crowdsourced HD map features via 4G/5G networks reduces local hardware costs and dramatically improves accuracy and reliability. Hardware and software decoupling: Positioning functions are increasingly being software-based, integrated into the SoC of the autonomous driving domain controller as algorithms rather than as standalone hardware boxes. This facilitates over-the-air (OTA) upgrades and reduces costs. Anti-interference and security: Protection against GNSS spoofing and jamming has become crucial, ensuring the safety and reliability of positioning systems under all circumstances. Policy support Governments around the world are promoting technology adoption through various means: China: High-precision positioning has been incorporated into its "New Infrastructure" and "Intelligent Connected Vehicle" development strategies, requiring some commercial vehicles to install safety monitoring equipment and vigorously promoting the use of the Beidou satellite system. The European Union: The GSR regulations mandate that new vehicles include safety features (such as Intelligent Speed Assist, or ISA), indirectly driving demand for high-precision positioning. The EU also supports the development of the Galileo satellite system. The United States: The Department of Transportation and other departments have issued guiding policies for autonomous driving, encouraging technological innovation and safe application.

The global ADAS High Definition Locator market size was estimated at USD 3381.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 18.30% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global ADAS High Definition Locator market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive

landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global ADAS High Definition Locator market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the ADAS High Definition Locator market.

### **Global ADAS High Definition Locator Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Mitsubishi Electric  
WAYMO  
TomTom  
Momenta  
Texas Instruments

Sanborn  
Gentex Corporation  
BMW  
GARMIN  
Baidu  
Bosch  
HERE

### **Market Segmentation (by Type)**

Single Positioning Module  
Multi-Source Fusion Positioning System

### **Market Segmentation (by Application)**

Passenger Vehicles  
Commercial Vehicles

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the ADAS High Definition Locator Market  
Overview of the regional outlook of the ADAS High Definition Locator Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the ADAS High Definition Locator Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of ADAS High Definition Locator, their

output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain  
Market dynamics scenario, along with growth opportunities of the market in the years to come  
6-month post-sales analyst support

### **Customization of the Report**

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