

Global Automotive DMS Infrared Illuminator Modules Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G859BB393DD2EN.html>

Date: July 2026

Pages: 129

Price: US\$ 4,480.00 (Single User License)

ID: G859BB393DD2EN

Abstracts

The global Automotive DMS Infrared Illuminator Modules market size is expected to reach \$ 578 million by 2032, rising at a market growth of 13.2% CAGR during the forecast period (2026-2032).

Automotive DMS infrared illuminator modules are physical automotive electronic components used in driver monitoring systems and in cabin vision sensing systems. Their core function is to provide stable near infrared active illumination for DMS cameras under night driving, low light, backlight, eyeglass reflection, partial face obstruction and other challenging cabin conditions, enabling the system to detect the driver's face, eyes, head pose, gaze direction, fatigue status and distraction behavior. The product forms mainly include infrared LED illuminator modules, VCSEL infrared illuminator modules, integrated infrared emitter modules with optical diffusers and lenses, and automotive grade illumination assemblies with driver circuits, substrates and thermal management structures. The manufacturing process generally covers infrared emitter chip packaging, automotive PCB or ceramic substrate assembly, optical beam shaping, diffuser integration, constant current driving, heat dissipation design, reliability validation and matching calibration with in cabin camera modules. Key specifications usually include 850 nm or 940 nm wavelength, field of illumination, radiant intensity, light uniformity, power consumption, junction temperature, lifetime, eye safety performance and automotive grade reliability. The product is mainly used in DMS, OMS, ICMS, smart cockpit cameras and human machine interaction functions related to assisted driving and vehicle safety. In 2025, global shipments of automotive DMS infrared illuminator modules were approximately 28 million units, the industry average price was about US\$7.5 per unit, and the industry average gross margin was around 32%.

Automotive DMS infrared illuminator modules sit at the intersection of automotive electronics, optoelectronic semiconductors and smart cockpit components. The upstream supply chain includes infrared LEDs, VCSEL chips, optical diffusers, lenses, driver ICs, automotive grade substrates and packaging materials. The midstream consists of infrared illuminator modules, DMS camera modules and mirror integrated sensing modules, while the downstream demand comes from vehicle manufacturers, cockpit system suppliers, ADAS platforms and safety driven original equipment programs. Although the value per vehicle is not high compared with complete DMS systems, the module is a critical hardware element for stable visual monitoring in low light and complex cabin environments. As fatigue detection, distraction monitoring and in cabin sensing move from premium models to mass market vehicles, the product has a clear penetration driven growth logic.

The competitive landscape is shaped by three groups of participants: infrared light source manufacturers, automotive camera module makers and Tier 1 system integrators. Infrared LED solutions remain the mainstream route for cost sensitive vehicle platforms, while VCSEL based illumination is gaining share in high end DMS, OMS, ToF and three dimensional cabin sensing applications. Competition is no longer limited to brightness or unit price. Automotive reliability, beam uniformity, thermal stability, eye safety, optical design and compatibility with camera algorithms are becoming more important. Recent consolidation in the optoelectronic semiconductor chain, new product launches and investment in automotive grade production capacity have strengthened the position of leading suppliers, while Asian supply chains are accelerating localization and cost optimization.

This report studies the global Automotive DMS Infrared Illuminator Modules production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive DMS Infrared Illuminator Modules and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive DMS Infrared Illuminator Modules that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive DMS Infrared Illuminator Modules total production and demand, 2021-2032, (K Units)

Global Automotive DMS Infrared Illuminator Modules total production value, 2021-2032,

(USD Million)

Global Automotive DMS Infrared Illuminator Modules production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive DMS Infrared Illuminator Modules consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive DMS Infrared Illuminator Modules domestic production, consumption, key domestic manufacturers and share

Global Automotive DMS Infrared Illuminator Modules production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive DMS Infrared Illuminator Modules production by Light Source Technology, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive DMS Infrared Illuminator Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive DMS Infrared Illuminator Modules market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ams OSRAM AG, Stanley Electric Co., Ltd., Coherent Corp., Focuslight Technologies Inc., BYD Semiconductor Co., Ltd., LG Innotek Co., Ltd., Ennostar Inc., Valeo SE, Magna International Inc., Gentex Corporation, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive DMS Infrared Illuminator Modules market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Light Source Technology, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive DMS Infrared Illuminator Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive DMS Infrared Illuminator Modules Market, Segmentation by Light Source Technology:

IR LED Illuminator Modules

VCSEL Illuminator Modules

Hybrid IR Illuminator Modules

Others

Global Automotive DMS Infrared Illuminator Modules Market, Segmentation by Wavelength:

850 nm Illuminator Modules

940 nm Illuminator Modules

Dual Wavelength Illuminator Modules

Others

Global Automotive DMS Infrared Illuminator Modules Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

New Energy Vehicles

Special Purpose Vehicles

Others

Companies Profiled:

ams OSRAM AG

Stanley Electric Co., Ltd.

Coherent Corp.

Focuslight Technologies Inc.

BYD Semiconductor Co., Ltd.

LG Innotek Co., Ltd.

Ennostar Inc.

Valeo SE

Magna International Inc.

Gentex Corporation

ROHM Co., Ltd.

Key Questions Answered:

1. How big is the global Automotive DMS Infrared Illuminator Modules market?
2. What is the demand of the global Automotive DMS Infrared Illuminator Modules market?
3. What is the year over year growth of the global Automotive DMS Infrared Illuminator Modules market?
4. What is the production and production value of the global Automotive DMS Infrared Illuminator Modules market?
5. Who are the key producers in the global Automotive DMS Infrared Illuminator Modules market?
6. What are the growth factors driving the market demand?

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