

# Global Automotive Thermal Camera Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Automotive Thermal Camera market size is expected to reach \$ 3814 million by 2032, rising at a market growth of 12.8% CAGR during the forecast period (2026-2032).

Automotive thermal imaging cameras are sensing devices designed specifically for vehicular environments, based on infrared thermal radiation imaging rather than reflected visible light. By detecting temperature differentials, these systems enable stable recognition of pedestrians, animals, vehicles, and infrastructure under conditions of darkness, glare, fog, rain, or snow, where conventional optical cameras face inherent limitations. Most automotive-grade solutions rely on uncooled long-wave infrared technology and are engineered to meet stringent requirements for reliability, functional safety, and integration within vehicle electronic architectures. Their role has evolved from niche premium features to critical perception elements supporting night vision, active safety enhancement, and redundancy in advanced automated driving systems. The industry momentum behind automotive thermal imaging cameras is driven by tightening road safety regulations, heightened attention to nighttime accident prevention, and growing consensus among vehicle manufacturers on the necessity of sensor redundancy. Government and regulatory communications across major markets consistently emphasize improved detection of vulnerable road users, encouraging a shift from single-sensor approaches toward multimodal perception architectures. At the same time, advances in uncooled infrared detectors, packaging, and algorithmic optimization have reduced system complexity and improved suitability for automotive deployment. While cost pressure, supply chain stability, and lengthy automotive qualification cycles remain challenges, the technology's trajectory reflects a transition from optional performance enhancement to safety-critical capability.

The supply chain is structured around key upstream components such as infrared detectors, optical materials, and core algorithms, with companies including Global

Sensor Technology, SAT Infrared, Seek Thermal, and InfiRay establishing differentiated competencies in sensor design and manufacturing. Midstream players focus on system integration and automotive-grade validation, where firms such as Teledyne FLIR, ADASKY, and IN-VISION collaborate closely with vehicle manufacturers and Tier 1 suppliers. Downstream demand is led by passenger vehicle OEMs, commercial vehicle manufacturers, and autonomous driving solution providers, with companies like Veoneer publicly identifying thermal imaging as an integral element of night vision and active safety systems. Across the value chain, customer emphasis has shifted toward system robustness, software fusion capability, and long-term supply credibility.

From a demand perspective, automotive thermal imaging cameras are expanding beyond standalone night vision assistance into broader applications within advanced driver assistance systems, including pedestrian warning, emergency braking decision support, and low-visibility safeguards for automated driving. Premium passenger vehicles and specific commercial segments were early adopters, but deployment is deepening across robotaxi platforms, special-purpose vehicles, and long-haul transportation. Engineering experience shows that thermal imaging's unique ability to detect living beings and heat sources complements the limitations of visible cameras and radar, reshaping perception system architectures toward more resilient multisensor configurations.

Regionally, North America has been influenced by sustained focus on nighttime driving safety and autonomous driving development, with manufacturers and technology companies highlighting infrared perception as part of safety redundancy strategies in official communications. Europe's strong regulatory framework and safety assessment regimes emphasize protection of vulnerable road users, creating institutional support for system-level adoption of thermal imaging. China and the broader Asia-Pacific region benefit from supportive intelligent vehicle policies and a mature domestic infrared industry chain, enabling end-to-end capability from detectors to complete systems and accelerating deployment in commercial vehicles and pilot projects. Other regions, while at an earlier stage, show clear functional demand in special vehicles and environments with limited infrastructure. In 2021, Teledyne announced the completion of its acquisition of FLIR Systems and subsequently identified automotive thermal imaging as a key technology direction for autonomous driving and safety sensing in official communications. In 2023, several European automakers publicly emphasized the enhancement of nighttime pedestrian and animal detection through multimodal sensing approaches, with thermal imaging cited as a viable option. In 2024, Chinese authorities released intelligent vehicle policy documents calling for stronger perception capabilities in complex environments, followed by official announcements from domestic infrared companies confirming vehicle-level validation and pilot deployment of automotive

thermal imaging products.

This report studies the global Automotive Thermal Camera production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Thermal Camera 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 Thermal Camera that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Automotive Thermal Camera total production and demand, 2021-2032, (K Units)

Global Automotive Thermal Camera total production value, 2021-2032, (USD Million)

Global Automotive Thermal Camera production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automotive Thermal Camera consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automotive Thermal Camera domestic production, consumption, key domestic manufacturers and share

Global Automotive Thermal Camera production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automotive Thermal Camera production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive Thermal Camera production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive Thermal Camera 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 Teledyne Technologies Inc., Valeo SA, Magna International Inc., Seek Thermal, Inc., Workswell s.r.o., L3Harris Technologies, Inc., Leonardo DRS, Inc., Continental AG, Autoliv Inc., Raytheon Technologies Corp., 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 Thermal Camera 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 Type, 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 Thermal Camera Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Global Automotive Thermal Camera Market, Segmentation by Type:

Resolution:384\*288

Resolution:640\*480

Others

## Global Automotive Thermal Camera Market, Segmentation by Sensor Technology:

Uncooled Microbolometer

Cooled Infrared Detector

Photonic Infrared Sensor

## Global Automotive Thermal Camera Market, Segmentation by Integration Level:

Standalone Camera Module

Integrated Sensor System

Connected/Networked Thermal Unit

Global Automotive Thermal Camera Market, Segmentation by Application:

Passenger Vehicle

Commercial Vehicle

**Companies Profiled:**

Teledyne Technologies Inc.

Valeo SA

Magna International Inc.

Seek Thermal, Inc.

Workswell s.r.o.

L3Harris Technologies, Inc.

Leonardo DRS, Inc.

Continental AG

Autoliv Inc.

Raytheon Technologies Corp.

Robert Bosch GmbH

Opgal Optronics Industries Ltd.

Exosens Group

InfraTec GmbH

Heap Sensors GmbH

Guide Sensmart Tech Co., Ltd.

iRay Technology Co., Ltd.

Hikvision Digital Technology Co., Ltd.

ZF Friedrichshafen AG

DENSO Corporation

Jenoptik AG

Hyundai Motor Group

Guide Infrared Co., Ltd.

FOTRIC Inc.

Sensys Gatso Group

Optotherm, Inc.

Tonbo Imaging

Vayyar Imaging Ltd.

Testo SE & Co. KGaA

Raythink Technology Co., Ltd.

XinTai Instrument Tech Co., Ltd.

**Key Questions Answered:**

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

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