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Global ADAS High Definition Locator Market Growth 2026-2032

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Abstracts

The global ADAS High Definition Locator market size is predicted to grow from US$ 3316 million in 2025 to US$ 10960 million in 2032; it is expected to grow at a CAGR of 19.0% from 2026 to 2032.

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

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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:

hina: High-precision positioning has been incorporated into its "New Infrastructure" and "Intelligent Connected Vehicle" development strategies, requiring some commercial

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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.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “ADAS High Definition Locator Industry Forecast” looks at past sales and reviews total world ADAS High Definition Locator sales in 2025, providing a comprehensive analysis by region and market sector of projected ADAS High Definition Locator sales for 2026 through 2032. With ADAS High Definition Locator sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world ADAS High Definition Locator industry.

This Insight Report provides a comprehensive analysis of the global ADAS High Definition Locator landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ADAS High Definition Locator portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global ADAS High Definition Locator market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ADAS High Definition Locator and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ADAS High Definition Locator.

This report presents a comprehensive overview, market shares, and growth opportunities of ADAS High Definition Locator market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

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Segmentation by Type:

Single Positioning Module

Multi-Source Fusion Positioning System

Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Mitsubishi Electric

WAYMO

TomTom

Momenta

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Texas Instruments

Sanborn

Gentex Corporation

BMW

GARMIN

Baidu

Bosch

HERE

Key Questions Addressed in this Report

What is the 10-year outlook for the global ADAS High Definition Locator market?

What factors are driving ADAS High Definition Locator market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ADAS High Definition Locator market opportunities vary by end market size?

How does ADAS High Definition Locator break out by Type, by Application?

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