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United States Advanced Driving Assistance System (ADAS) Market Assessment, By Stage [Level 1, Level 2, Level 3, Level 4, Level 5, Level 6], By System [Driver Monitoring System, Blind Spot Detection, Automatic Emergency Braking System, Others], By Sensor [LiDAR Sensor, Ultrasonic Sensor, Infrared (IR) Sensor, Radar Sensor, Others], By Vehicle [Electric, Internal Combustion Engines (ICE)], By Distribution Channel [Original Equipment Manufacturer (OEM's), Dealers and Distributors, Aftermarket], By Region, Opportunities and Forecast, 2016-2030F

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Abstracts

United States Advanced Driving Assistance System (ADAS) Market size was valued at USD 10.06 billion in 2022 which is expected to reach USD 17.70 billion in 2030 with a CAGR of 7.32% for the forecast period between 2023 and 2030. The United States ADAS market has witnessed significant growth owing to increasing concerns about road safety, government regulations mandating safety features in vehicles, and growing consumer demand for advanced safety technologies. One of the key market drivers is the rising number of road accidents and fatalities. ADAS technologies such as forward collision warning, lane departure warning, and automatic emergency braking help prevent accidents by alerting drivers to potential hazards and intervening if necessary. Government regulations and safety standards also play a crucial role in driving the ADAS market. Regulatory bodies are mandating the inclusion of specific safety features in vehicles, thereby increasing the adoption of ADAS technologies.

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Buyers are increasingly prioritizing vehicles with ADAS technologies, as they offer a sense of security and confidence on the road. The convenience and comfort provided by features like adaptive cruise control and parking assistance systems are also contributing to the growing demand. Furthermore, there are several new developments in the ADAS market. One notable trend is the integration of artificial intelligence (AI) and machine learning (ML) algorithms in ADAS systems, enabling vehicles to analyze and interpret real-time data for better decision-making and autonomous functionality. Another development is the emergence of connected car technologies. ADAS systems can leverage vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) communication to exchange information, improving overall road safety and efficiency. Moreover, the advancements in sensor technologies, such as radar, LiDAR, and cameras, have enhanced the capabilities of ADAS systems in detecting and responding to various road conditions and potential hazards.

For instance, in 2023, ZF offers a diverse range of intelligent advanced driver assistance systems (ADAS) that are scalable in terms of cost and functionality, thereby enabling the integration of Level 2+ semi-automated driving systems in passenger cars. These systems play a pivotal role in enhancing both safety and comfort for drivers and passengers alike. ZF's comprehensive portfolio of ADAS solutions ensures that the desired level of safety and convenience can be achieved based on individual preferences and requirements.

Increasing Demand for Safety Features in Vehicles

The ADAS market is experiencing growth demand for safety features in vehicles. With a growing emphasis on road safety, consumers are seeking technologies that can enhance the overall safety of their driving experience. ADAS systems provide a range of safety features such as forward collision warning, lane departure warning, blind-spot detection, and automatic emergency braking. These features help prevent accidents, mitigate the severity of collisions, and alert drivers to potential hazards. Additionally, regulatory bodies are implementing stringent safety standards and mandating the inclusion of specific ADAS features in vehicles. As a result, automakers are actively incorporating ADAS technologies to meet consumer expectations and regulatory requirements, driving the overall demand for safety features in the United States ADAS market.

During the first nine months of 2022, the estimated fatality rate per 100 million vehicle miles traveled decreased to 1.30, demonstrating a decline from the projected rate of 1.32 fatalities for the same period in 2021. Another reason for the increasing demand

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for safety features is that consumers are becoming more aware of the benefits of these features. Studies have shown that ADAS features can significantly reduce the risk of accidents.

Technological Advancements

The United States Advanced Driving Assistance System (ADAS) market has witnessed significant technological advancements in recent years. One notable advancement is the integration of artificial intelligence (AI) and machine learning (ML) algorithms into ADAS systems. These technologies enable vehicles to analyze and interpret real-time data from sensors and cameras, enhancing their perception and decision-making capabilities. Additionally, there have been advancements in sensor technologies such as radar, LiDAR, and cameras, improving their accuracy, range, and resolution. This enables ADAS systems to detect and track objects more effectively, enhancing the overall safety and performance of the systems. Connectivity and vehicle-to-everything (V2X) communication technologies have also advanced, allowing ADAS systems to exchange data with other vehicles and infrastructure, enabling features like cooperative collision warning and traffic optimization. Moreover, some companies allowing there semi-autonomous driving technology available to other carmakers under licence. These technological advancements continue to drive innovation in the United States ADAS market, paving the way for safer and more efficient driving experiences.

For example, in 2023, Tesla revealed plans to potentially license the company's semi-autonomous driving technology to other car manufacturers. This announcement comes as Tesla considers extending access to its advanced driver assistance systems to the broader automotive industry.

Increasing Demand for Premium and Luxury Cars

The United States Advanced Driving Assistance System (ADAS) market is experiencing an increasing demand for premium and luxury cars equipped with advanced safety features. Discerning consumers in this segment prioritize not only superior performance and luxury, but also the latest ADAS technologies that enhance safety and convenience. Features like adaptive cruise control, lane-keeping assist, and automatic emergency braking are sought after in premium and luxury vehicles, as they provide an elevated driving experience and peace of mind. Automakers are responding to this demand by integrating cutting-edge ADAS systems into their high-end models, further fueling the growth of the ADAS market in the premium and luxury car segment.

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For example, in 2023, Mercedes has surpassed Tesla in the field of self-driving technology and has become the first company to achieve Level-3 autonomous car certification in the United States. This certification applies to their latest S-Class and EQS Sedan models, which are currently being produced and are expected to be available on the Vegas strip by the third quarter of this year.

Level 2 Segment Drive the Market Expansion

The Level 2 segment is driving the market expansion for the United States Advanced Driving Assistance System (ADAS) market. Level 2 ADAS systems, which provide a combination of advanced features like adaptive cruise control, lane-keeping assist, and automated parking, are gaining popularity among consumers. These systems offer a higher level of convenience and safety compared to basic ADAS features. The increasing demand for vehicles equipped with Level 2 ADAS systems is driven by the desire for enhanced driving experiences and improved safety. As a result, automakers are focusing on developing and integrating Level 2 technologies into their vehicles to meet the growing consumer demand and drive market growth.

Government Regulation

The ADAS market in the United States is subject to various government regulations aimed at improving road safety and ensuring the effective operation of ADAS technologies. The Federal Motor Vehicle Safety Standards (FMVSS) is a notable regulation that establishes safety standards for vehicles sold in the country. FMVSS encompasses requirements concerning crash avoidance and pedestrian safety, among others. Additionally, regulatory bodies such as the National Highway Traffic Safety Administration (NHTSA) actively participate in the assessment and regulation of ADAS technologies to verify their efficacy and compliance with safety standards. These governmental regulations significantly influence the development and implementation of ADAS systems in the United States.

Impact of COVID-19

The pandemic had a significant impact on the United States Advanced Driving Assistance System (ADAS) market. With lockdown measures and restrictions on movement, the automotive industry faced disruptions in manufacturing and supply chains, leading to delays and reduced production of vehicles equipped with ADAS technology. Additionally, the economic downturn and uncertainty caused by the pandemic resulted in a decline in consumer purchasing power, leading to a decrease in

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demand for new vehicles and ADAS systems. However, as the situation improved and the automotive industry recovered, there has been a gradual resurgence in the ADAS market, driven by increased emphasis on safety and the growing adoption of autonomous driving technologies.

Impact of Russia-Ukraine War

The Russia-Ukraine war has had indirect implications on the United States Advanced Driving Assistance System (ADAS) market. These disruptions in the supply chain may lead to delays and shortages in critical components and technologies used in ADAS systems. Furthermore, the heightened geopolitical risks and market volatility caused by the conflict can impact consumer confidence and investment decisions, potentially affecting the demand for new vehicles and ADAS technologies in the United States. The full extent of the impact will depend on the duration and intensity of the conflict and its subsequent repercussions on global trade and stability.

Key Player Landscape and Outlook

Several companies are engaged in the development and production of a broad range of ADAS functionalities, encompassing features like automatic emergency braking (AEB), lane departure warning (LDW), blind spot monitoring (BSM), and adaptive cruise control (ACC). Furthermore, they are investing in research and development efforts to create new ADAS capabilities and enhance the performance of existing features. The ADAS market in the United States is both competitive and filled with opportunities. Its growth is propelled by various factors, including government regulations, increasing consumer demand, and advancements in technology. Companies that can innovate and deliver effective ADAS functionalities are well-positioned to thrive in this dynamic market.

For instance, June 2023, Magna has bolstered its active safety business through the successful acquisition of Veoneer Active Safety from SSW Partners. This deal, which has been finalized, establishes Magna as one of the few suppliers equipped to address the growing complexity arising from advanced software, system, and integration challenges. By providing a comprehensive range of solutions, Magna is well-positioned to meet the needs of its customers in this rapidly evolving landscape.

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Contents

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11. KEY PLAYERS LANDSCAPE

11.1. Competition Matrix of Top Five Market Leaders
11.2. Market Revenue Analysis of Top Five Market Leaders (in %, 2022)
11.3. Mergers and Acquisitions/Joint Ventures (If Applicable)
11.4. SWOT Analysis (For Five Market Players)
11.5. Patent Analysis (If Applicable)

12. PRICING ANALYSIS

13. CASE STUDIES

14. KEY PLAYERS OUTLOOK

14.1. Continental AG
  14.1.1. Company Details
  14.1.2. Key Management Personnel
  14.1.3. Products & Services
  14.1.4. Financials (As reported)
  14.1.5. Key Market Focus & Geographical Presence
  14.1.6. Recent Developments
14.2. Delphi Automotive Plc
14.3. Denso International America, Inc.
14.4. Robert Bosch GMBH
14.5. Magna International Inc.
14.6. Valeo
14.7. ZF TRW Automotive
14.8. Visteon Corp.
14.9. Aptiv Plc
14.10. Mobileye Vision Technologies Ltd
14.11. Tesla, Inc.
*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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