

ADAS Market by Offering (Hardware (Camera, Radar, LiDAR, Ultrasonic, ECU), Software (Middleware, Application Software & OS)), System Type, Vehicle Type (PC, LCV, HCV), Level of Autonomy, Vehicle Class, EV type and Region - Global Forecast to 2030

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Abstracts

The global ADAS market size is projected to grow from 334 million units in 2024 to 655 million units by 2030, at a CAGR of 11.9%. The ADAS market is witnessing robust growth driven by increasing demand for electric and autonomous vehicles may drive the market for ADAS systems. Electric vehicles require advanced sensors and control systems in harmony to ensure safe and efficient operation, which is expected to increase the demand for ADAS systems in these vehicles. The growing trend of autonomous vehicles and the focus on safety are also likely to increase the demand for ADAS, as these vehicles require advanced systems for navigation, obstacle detection, and collision avoidance.

The Adaptive Cruise Control segment is expected to have notable growth opportunities during the forecast period.

ACC systems can utilize laser or radar technology; some incorporate cameras for added functionality. Many original equipment manufacturers (OEMs) are heavily investing in advanced features associated with ACC. Technological advancements and the growing emphasis on passenger safety positively influence the proliferation of ACC. The Surge in road accidents has contributed to the increased adoption of ACC systems in vehicles. Numerous luxury vehicles feature an active detection system to identify cyclists and apply automatic braking when necessary. For example, Swedish-designed cars have previously demonstrated the ability to detect pedestrians and respond to their sudden movements.

Additionally, German automakers have showcased advancements in developing cutting-edge vehicle controls. For instance, BMW created a system for left turn assist, aiming to increase safety while performing such maneuvers in countries with right-hand traffic. Companies such as Continental, NXP Semiconductors, Bosch, Aptiv, ZF, Mobileye, and Denso provide adaptive cruise control systems.

Passenger car segment to show the most significant growth in the ADAS market during the forecast period

The number of electronic applications in a vehicle has increased significantly over the last few years due to the demand for increased safety, comfort, and convenience for consumers. Factors such as improved living standards, changing buyer preferences, and increased average miles driven yearly (precipitated by the increasing vehicle fleet) have raised the demand for ADAS. The demand for enhanced safety features, such as collision avoidance systems, lane departure warnings, and emergency braking, pushes passenger vehicle manufacturers to adopt sophisticated in-vehicle ADAS solutions. Passenger cars encompass a range of vehicle types, including sedans, hatchbacks, station wagons, SUVs, MUVs, and vans. This segment stands out as the most promising and significant Advanced Driver Assistance Systems (ADAS) market, owing to the increasing demand for safer and more comfortable vehicles. The rising popularity of luxury vehicles further fuels this trend. Governments in both developed and developing nations are contemplating mandates for ADAS systems in passenger cars. Furthermore, deploying ADAS technology aligns with the growing trend of connected and autonomous vehicles, allowing for real-time monitoring and communication. Such strategies to enter the autonomous passenger cars market are expected to reinforce ADAS's role in elevating safety standards.

China is expected to show substantial growth in the Asia Pacific region for ADAS market.

China is projected to dominate the Asia Pacific ADAS market during the forecast period. The country's expanding middle-class population with higher disposable incomes has increased demand for premium and luxury vehicles. Improving living standards, the proliferation of innovative city initiatives, and a continuously expanding population have significantly contributed to the increased production and sales of passenger cars. While safety regulations exist in select Asia Pacific nations like Japan and South Korea, demand in these regions is projected to surge over the next five years. Countries such as China is poised to implement stricter regulations concerning vehicle and road safety,

particularly regarding the incorporation of Advanced Driver Assistance Systems (ADAS) in vehicles driven by the escalating population and demand for automobiles. China has made significant strides in advancing Advanced Driver Assistance Systems (ADAS) in recent years. Among the prominent ADAS system manufacturers in the country are Baidu Apollo, Momenta, Pony.ai, and Xpeng, as well as global entities like Bosch, Continental, and Aisin. Several leading ADAS developers have established operations within China to cater to local Original Equipment Manufacturers (OEMs) such as BYD, Chery, FAW, and GAC. Notably, numerous Chinese enterprises like Baidu, Tencent, and Alibaba have invested substantially in the research and development of ADAS technology, encompassing autonomous driving and connected vehicles. Moreover, the Chinese government actively fosters ADAS development through supportive policies and regulations. For instance, The Chinese government issued safety guidelines for using autonomous vehicles in public transport, the latest in a series of measures preparing for the increased use of driverless cars in December 2023.

In-depth interviews were conducted with CXOs, marketing directors, other innovation and technology managers, and executives from various key organizations operating in the ADAS market. The break-up of the primaries is as follows:

By Company Type: OEMs – 24%, Tier 1 – 67% and Tier 2 & 3 – 9%,

By Designation: CXO – 33%, Managers – 52%, and Executives – 15%

By Region: North America – 26%, Europe – 30%, Asia Pacific – 35%, and ROW – 9%

The ADAS market comprises major manufacturers such as Robert Bosch (Germany), ZF Friedrichshafen (Germany), Continental AG (Germany), Denso (Japan), Magna International (Canada), and Mobileye (Jerusalem).

Research Coverage:

The study covers the ADAS market across various segments. It aims to estimate the market size and future growth potential of this market across different segments such as Vehicle Class, Level of Autonomy, vehicle type, Electric Vehicle Type, System Type, Offering, and Region. The study also includes an in-depth competitive analysis of key market players, their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

This research report categorizes ADAS market by System Type (Adaptive Cruise Control, Adaptive Front Light, Adaptive Emergency Braking, Blind spot detection, Cross-traffic Alert, Driver Monitoring System, Intelligent Park Assist, Forward Collision Warning, Lane Departure Warning, Night Vision System, Pedestrian Detection System, Road Sign detection, Tire Pressure Monitoring System, Traffic Jam Assist), Vehicle Type (Passenger Cars, light commercial vehicle, trucks, and buses), level of autonomy (L1, L2, L3, L4, and L5), Vehicle Class (Asia Pacific, Europe, North America, and Rest of the world), By Offering (hardware(camera unit, radar sensor, LiDAR, ultrasonic sensor, ECU and others), software (middleware, application software, and operating system) and Region (Asia Pacific, Europe, and North America and rest of the world).

The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the ADAS market. A thorough analysis of the key industry players provides insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches; mergers and acquisitions; and recent developments associated with the ADAS market. This report covers a competitive analysis of SMEs/startups in the ADAS market ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall ADAS market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increased focus on vehicle safety, ADAS-driven comfort and safety enhancement, Surge in premium vehicle demand, Shift towards the autonomous vehicle, Government regulation and safety standards), restraints (Lack of adequate infrastructure and public reception of autonomous vehicle), opportunities (Advancement in autonomous vehicle, 5G integration in autonomous networks, rising incorporation of IoT, growing EV sales, future of autonomous ride-sharing, innovative LiDAR technology through key startups, rise of automotive ethernet), and challenges (ADAS integration at a premium

cost and sensor limitations and security concerns) influencing the growth of the ADAS market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the ADAS market.

Market Development: Comprehensive information about lucrative markets – the report analyses the ADAS market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the ADAS market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Robert Bosch (Germany), ZF Friedrichshafen (Germany), Continental AG (Germany), Denso (Japan), Magna International (Canada), Mobileye (Jerusalem) among others in the ADAS market.

Strategies: The report also helps stakeholders understand the pulse of the ADAS market and provides them with information on key market drivers, restraints, challenges, and opportunities

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