

Augmented Reality Automotive Market by Function (AR HUD Navigation, AR HUD ACC, AR HUD LDW & Advanced AR HUD), Sensor Technology, Display Technology, Level of Autonomous Driving, Electric Vehicle, Vehicle Type, and Region - Global Forecast to 2025

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Abstracts

“Rapid technological advancement and increasing consumer demand for advanced safety functions are expected to fuel the demand for the augmented reality automotive market”

The augmented reality automotive market is projected to grow at a CAGR of 30.31% during the forecast period, to reach a market size of USD 7.98 billion by 2025. This highly advanced technology is expected to be launched in luxury and premium range of vehicles once it becomes commercially available in 2018–2019. The luxury car segment is one of the larger contributors to the global luxury goods market. This car segment is primarily led by the demand for technologically advanced cars in developed countries such as U.S., Germany, U.K. and emerging markets such as China and Brazil that have an increasing number of affluent buyers. With growing demand for in-vehicle safety functions and advanced technology, OEMs are increasingly combining connectivity and safety functions to maintain brand differentiation and attract consumers. The growth of such combinations could escalate the role for augmented reality head-up displays (AR HUD), which would integrate real-time advanced driver assistance systems with the safety functions of AR HUD.

“Passenger car is the fastest growing segment of the augmented reality automotive market”

Passenger cars are estimated to account for the largest share of the augmented reality automotive market. The market growth in the segment can be attributed to the growing demand for advanced technology in passenger cars. The need to monitor multiple in-vehicle displays can be a cause of distraction for the driver, triggering potential dangerous situations on the road. The AR HUD will enhance safety by displaying all the information required by the driver on the windshield of a vehicle in the driver's line of sight. The AR HUD, when integrated with active and passive systems, will assist a driver in avoiding crashes. The demand for such advanced technology is expected to increase in developing and developed countries such as the U.S., Germany, U.K., China, and Japan, where there is high adoption of advanced in-vehicle safety technologies.

“Semi-autonomous is the fastest growing segment of the augmented reality automotive market, by level of autonomous driving”

With the increase in demand for semi-autonomous functions, the penetration of semi-autonomous vehicles is expected to rise in the coming years. The demand for semi-autonomous vehicles is driven by the need for a more comfortable and safe driving experience that will provide enhanced safety, even in potentially dangerous driving circumstances. In addition, technologically driven companies and OEMs are collaborating to make semi-autonomous vehicles a safe mode of transportation, thereby engaging consumer curiosity. Semi-autonomous driving capabilities, which use adaptive cruise control and advanced sensor technologies, can help the vehicle to provide in-depth information to the driver on vehicle data and external environment. The semi-autonomous functions will not only alert the driver of potential dangers but will also have advanced control capabilities, reducing the stress of driving for the driver. Since the AR HUD will make this information available in the driver's field of view, it will enhance the safety of the vehicle and the passengers.

“OLED, AMOLED: Fastest growing display technology of the augmented reality automotive market”

The other advanced display technologies including OLED, AMOLED, etc. are widely used in consumer electronics applications such as television displays, smartphones, and others. These advanced display technologies allow flexibility in design and color and provide an enhanced visual appeal. They offer superior quality images and brighter displays as compared to LCD and TFT-LCD display panels. However, these display technologies are not frequently used in automotive applications due to low-temperature

resistance and durability of these panels for automotive functions. The demand for visually appealing and legible augmented reality imagery will grow with increasing integration of advanced driver assistance systems in AR HUD. The semi-autonomous and autonomous passenger cars and electric vehicles are expected to be equipped with advanced AR HUD. This is expected to drive the demand for advanced display technology panels at a fast rate.

BREAKDOWN OF PRIMARIES

The study contains insights provided by various industry experts, ranging from equipment suppliers to Tier-1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: Tier-1–45%, Tier-2–32%, and OEM–23%

By Designation: C level–35%, D level–25%, Others–40%

By Region: North America–35%, Europe–35%, Asia-Oceania–25%, RoW–5%

The report provides detailed profiles of the following companies:

Continental AG

Denso Corporation

DigiLens Inc.

Garmin Limited

General Motors

Harman International Industries Inc.

Hyundai Motor Company

LG Business Solutions

MicroVision, Inc.

Nippon Seiki Co, Ltd

Panasonic Corporation

Pioneer Corporation

Robert Bosch GmbH

Texas Instruments Inc.

Visteon Corporation

Volkswagen AG

WayRay SA

Yazaki Corporation

Research Coverage

The augmented reality automotive market has been segmented by function (standard augmented reality head-up display (AR HUD), AR HUD navigation, AR HUD adaptive cruise control, and AR HUD lane departure warning), sensor technology (radar, Lidar, image, and sensor fusion), display technology (TFT-LCD and other advanced technologies), electric vehicle (battery electric vehicle and other (hybrid electric vehicles)), level of autonomous driving (conventional and semi-autonomous), vehicle type (passenger cars and commercial vehicles) and region (Asia-Oceania, Europe, North America, and Rest of the World). The market has been projected in terms of volume ('000 units) and value (USD million/billion).

Reasons to Buy the Report:

This report contains various levels of analysis, including industry analysis (factor analysis and Porter's Five Forces) and company profiles and competitive leadership analysis, which together comprise and discuss the basic views on the emerging and high-growth segments of the augmented reality automotive market, competitive landscape, high-growth regions and countries, government initiatives, and market

dynamics such as drivers, restraints, opportunities, and challenges.

The report enables new entrants/smaller firms as well as established firms to understand the market better to help them acquire a larger market share. Firms purchasing the report could use any one or a combination of the below-mentioned four strategies (market development, product development/innovation, market diversification, and competitive assessment) to strengthen their position in the market.

The report provides insights with reference to the following points:

Market Development: The report provides comprehensive information about lucrative emerging markets. The report analyzes the augmented reality automotive market for all vehicle types across regions.

Product Development/Innovation: The report offers detailed insights about R&D activities, upcoming technologies, and new product launches in the augmented reality automotive market across all regions.

Market Diversification: The report provides detailed information about untapped markets, investments, new products, and recent developments in the augmented reality automotive market.

Competitive Assessment: The report offers an in-depth assessment of strategies, products, and manufacturing capabilities of leading players in the augmented reality automotive market.

Vendor DIVE Analysis: The report provides company-level mapping of net sales, growth rate of a company's net sales, overall regional presence, company's presence/plans in emerging countries, mapping of inorganic and organic developments, manufacturing plants, company's presence in the OE and aftermarket segments, product offerings (breadth and depth), new product developments in recent years, and R&D expenditure, among others.

Company-wise product and business strategy scorecards: The report offers company level analysis and evaluation of product offering category including the breadth of offering, product innovation, and market presence (OEM and aftermarket) and company level analysis and evaluation of business strategies including company's reach (based on regional presence), revenue growth, infrastructure and clientele, inorganic growth (on the basis of partnerships,

collaborations, and acquisitions) and organic growth (on the basis of geographic expansion and new product development).

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