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Automotive LiDAR - Company Evaluation Report, 2024

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Abstracts

The Automotive Lidar Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Automotive Lidar. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and emerging trends shaping the industry. MarketsandMarkets 360 Quadrants evaluated over 100 companies, of which the Top 13 Automotive Lidar Companies were categorized and recognized as quadrant leaders.

The automotive LiDAR market is experiencing notable progress, particularly with the emergence of advanced technologies such as 4D LiDAR. In January 2024, Aeva Inc. (US) introduced its Atlas 4D FMCW LiDAR, marking a significant milestone in the field, and named Daimler Trucks AG (Germany) as its first customer. Likewise, in December 2024, Aeva expanded its partnership with SICK AG (Germany) to incorporate its FMCW technology into SICK’s high-performance sensors, highlighting the increasing adoption of sophisticated LiDAR technologies across diverse applications.

An increasing number of vehicle models are being equipped with state-of-the-art LiDAR systems, underlining the industry’s focus on advancing autonomous driving features. For instance, Mercedes-Benz Group AG (Germany) includes Level 3 DRIVE PILOT systems featuring SCALA LiDAR from Valeo in its EQS and S-Class sedans—demonstrating how leading automakers are embracing LiDAR to fulfill the rising demand for greater driving autonomy. This trend is projected to persist. For example, the 2025 BYD Han EV is anticipated to incorporate LiDAR from RoboSense (China), and both the BMW 7 Series and i7 are expected to feature a single LiDAR sensor from Innoviz Technologies Ltd. (Israel).

The 360 Quadrant maps the Automotive Lidar companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Automotive Lidar quadrant. The top criteria for product

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footprint evaluation included By ICE VEHICLE TYPE (Passenger Car, Light Commercial Vehicle (LCV), Heavy Commercial Vehicle (HCV), Insights from Industry Experts), By ELECTRIC VEHICLE TYPE (Battery Electric Vehicle (BEV), Fuel Cell Electric Vehicle (FCEV), Plug-in Hybrid Electric Vehicle (PHEV), Hybrid Electric Vehicle (HEV), Insights from Industry Experts), By IMAGE TYPE (2D, 3D, Insights from Industry Experts), By LASER WAVELENGTH (Near-infrared, Short-wave Infrared, Long-wave Infrared, Insights from Industry Experts), By LEVEL OF AUTONOMY (Semi-autonomous, Autonomous, Insights from Industry Experts), By LOCATION (Bumper & Grille, Headlight & Taillight, Roof & Upper Pillar, Other Locations, Insights from Industry Experts), By MEASUREMENT PROCESS (Time of Flight (TOF), Frequency-measurement Continuous Wave (FMCW), Insights from Industry Experts), By TECHNOLOGY (Mechanical Lidar, Solid-state Lidar, Insights from Industry Experts), and By RANGE (Short- & Mid-range (170 Meters and Below), Long-range (Above 170 Meters), Insights from Industry Experts).

Key Players

Key players in the Automotive Lidar market include major global corporations and specialized innovators such as Honeywell International Inc., Safran, Te Connectivity Ltd., Meggitt Plc, Ametek Inc., Lockheed Martin Corporation, Woodward, Rtx, Thales, L3HARRIS Technologies, Inc., The Bosch Group, Trimble Inc., Curtiss-Wright Corporation, Eaton Corporation, Crane Aerospace & Electronics, Stellar Technology, Amphenol Corporation, Tdk Corporation, Ultra Precision Control Systems, Vectornav Technologies Llc, and Emcore Corporation. These companies are actively investing in researchand development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

Top Three Companies Analysis

RoboSense Technology Co., Ltd.

RoboSense stands out with a diverse product portfolio that includes solid-state and hybrid LiDAR solutions. The company's technological expertise is evident in its strategic partnerships and high-profile orders, emphasizing its leadership in the LiDAR market. The firm's adaptive strategies and relentless pursuit of innovation illustrate a solid market positioning and a robust company ranking.

Hesai Group

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Hesai Group is distinguished by its wide LiDAR product portfolio, supporting various automotive applications. The company's market presence is reinforced by partnerships with industry leaders like Baidu, indicating its strategic significance in the autonomous vehicle sector. However, its market share could face challenges due to competitive pressures and regional market concentration.

Luminar Technologies, Inc.

Luminar Technologies excels with its vision-based LiDAR and machine perception technologies, which are crucial for self-driving vehicles. The company's strong brand and collaborations with major OEMs enhance its market presence and product portfolio. Luminar's focused growth strategy, through organic development and strategic alliances, supports its competitive positioning and market share.

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