

HD Map for Autonomous Vehicles Market by Solution (Cloud-Based & Embedded), LOA(L2, L3, L4, & L5), Usage (Passenger & Commercial), Vehicle Type, Services (Advertisement, Mapping, Localization, Update & Maintenance), & Region - Global Forecast to 2030

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Abstracts

The HD maps for autonomous vehicles market is estimated to be USD 1.4 Billion in 2021 and is projected to grow at a CAGR of 31.7% during the forecast period, to reach USD 16.9 Billion by 2030. HD maps are primarily used in autonomous vehicles. These are the maps designed for use by the machines that drive the autonomous vehicles. HD maps offer high-precision localization, environment perception, planning and decision making, and real-time navigation cloud services to autonomous vehicles. OEMs across the globe are investing in the development of autonomous vehicles. Although level 5 fully autonomous vehicles are not expected to be commercially available until 2025, many of the associated technologies have already been developed, and thousands of patent applications have been filed to secure intellectual property rights. Ford had the largest number of patents related to autonomous vehicle technology, followed by Toyota by the end of 2020. Since 2011, Ford submitted 14,354 patents and 13,000 patents were submitted by Toyota by the end of 2020.

With the growing trend of autonomous driving technology, the global HD maps market is expected to grow at a significant rate in the future. The promising market for self-driving car renting services and increased investments in autonomous driving technology startups are expected to boost the HD maps market. In addition, increasing R&D activities related to HD maps by leading HD map suppliers and several startups will further fuel the growth of HD maps for autonomous vehicle market. However, high

investment costs and slow adoption rates in developing countries are considered the major restraints for this market.

North America is estimated to be the largest market for HD maps for autonomous vehicles during the forecast period. The North American market is principally driven by the increasing demand for a safe, efficient, and convenient driving experience; rising investment in autonomous vehicle technology; and a strong presence of HD map suppliers. The increase in government support and the availability of suitable infrastructure for semi-autonomous and autonomous vehicles are likely to drive market growth in the region. Asia Oceania is projected to grow at the highest CAGR of 34.3%. China, Japan, and South Korea are the key countries in the region leading the fast-paced development. The government support for autonomous vehicle technology is also a driving factor for the growth of the Asia Oceania market.

Some of the major players in the HD map for autonomous vehicle market are TomTom (the Netherlands), HERE Technologies (the Netherlands), Waymo (US), NVIDIA (US), Baidu (China), Dynamic Map Platform (Japan), NavInfo (China), and Zenrin (US). These players have long-term supply contracts with leading automotive manufacturers and autonomous vehicle technology developers. These companies have adopted the strategies of new product developments, acquisitions, agreements, collaborations, expansions, joint ventures, partnerships, and supply contracts to gain traction in the HD map for autonomous vehicle market. Partnership and collaboration are the most widely adopted strategies by major players. For instance, in September 2019, TomTom and HELLA Aglaia collaborated to update the TomTom High Definition Map in real-time using crowdsourced camera data from vehicles. As part of the collaboration, HELLA Aglaia will use AutoStream, which is TomTom's innovative map delivery system, to access the latest TomTom HD Map on demand and will use the HD Map in the vehicle for accurate localization.

“Wide adoption of HD maps in passenger mobility segment expected to lead to market growth”

Personal mobility is estimated to be the largest segment of the HD map for autonomous vehicle market, by usage type, owing to the higher volume of semi-autonomous vehicle sales, and a majority of semi-autonomous vehicles would be used for personal transportation. OEMs such as Honda, Nissan, General Motors, and Mercedes-Benz promote the use of HD map and use it to develop its level 2 and level 3 semi-autonomous vehicles. The commercial mobility segment is projected to be the fastest-growing because of the high demand for ride-sharing services, predominant usage of

autonomous vehicles for ride-sharing and robo-taxi services, and growing partnership between ride-sharing companies and HD map providers.

The transportation of goods by autonomous vehicles helps minimize the cost of delivery. E-commerce companies mostly drive the delivery of goods by autonomous vehicles. According to companies like Continental, 80% of all business-to-consumer deliveries will be done by driverless cars in the future. OEMs, autonomous vehicle technology providers, and logistics/transportation companies such as Pony.ai, FedX, and Ford are involved in testing autonomous last delivery vehicles across the world. For example, in June 2021, Ford and Hermes, a consumer delivery company in the UK, started testing autonomous vehicles for delivery. HD mapping companies can focus on developing HD maps and other related solutions for the commercial mobility segment as it can provide high growth opportunities, especially for new entrants.

“Level 2&3 semi-autonomous vehicles to ensure dominant position of the segment”

HD map market for Level 2&3 semi-autonomous vehicles is estimated to be the largest market, and the market for Level 4&5 autonomous vehicles is expected to be the fastest-growing market during the forecast period. The semi-autonomous vehicle segment dominates because of the demand for features such as Co-operative Adaptive Cruise Control, Highway Autopilot, Auto Lane Change, and Hands-free Auto Parking. Other factors include stringent laws concerning autonomous driving and a greater number of semi-autonomous vehicles on road than autonomous vehicles during the forecast period. Rapid advancements and the decreasing cost of ADAS components and solutions are expected to spur the growth of the HD map market for semi-autonomous vehicles. For example, ZF unveiled its coASSIST level 2+ driving system in 2020 with a price range of USD 1,000. Such affordable ADAS solutions would increase the penetration of major ADAS features in a standard ADAS package. ZF offers copilot, a scalable ADAS solution for level 2+ to level 4 driving systems, was co-developed with NVIDIA. These affordable ADAS solutions would significantly boost the adoption of ADAS and the demand for HD maps for semi-autonomous vehicles. The autonomous vehicles segment is projected to have a significant growth rate during the forecast period. The continuous improvement in HD map technology is also a major factor boosting the growth of the market. Increasing investments for the development of level 4 and level 5 technologies and the growth in the testing activities of level 4 and level 5 autonomous vehicles will drive the HD map market for autonomous vehicles.

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

By Department: Sales/Marketing - 45%, Production & Procurement – 35%, CXOs - 20%

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

By Region: Asia Pacific- 40%, North America - 20%, Europe - 35%, RoW-5%

Major players profiled in the report are TomTom (Netherlands), HERE (Netherlands), NVIDIA (US), Waymo (US), Baidu (China), Dynamic Map Platform (Japan), and NavInfo (China).

Research Coverage

The report segments the HD maps for autonomous vehicles harness market and forecasts its size, by value, on the basis of service type (mapping, localization, updates and maintenance, and advertisement), level of automation (semi-autonomous driving vehicles, autonomous driving vehicles), solution type (cloud based, embedded), usage type (operational data, commercial mobility), vehicle type (passenger car, commercial vehicles) & region. It also covers the competitive landscape and company profiles of the major players in the HD maps for autonomous vehicles harness market ecosystem.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue and value for the HD maps for autonomous vehicles harness market and its sub segments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

The report will also help the market players understand the impact of COVID-19 on HD maps for autonomous vehicles harness market.

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

Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

1.2.1 SEGMENTAL DEFINITIONS, INCLUSIONS, AND EXCLUSIONS

TABLE 1 SEGMENTAL DEFINITIONS, INCLUSIONS, AND EXCLUSIONS: HD MAP FOR AUTONOMOUS VEHICLE MARKET

TABLE 2 OTHER KEY DEFINITIONS

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 MARKETS COVERED: HD MAP FOR AUTONOMOUS VEHICLE MARKET

1.3.2 YEARS CONSIDERED IN THE STUDY

1.4 LIMITATIONS

1.5 STAKEHOLDERS

1.6 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 HD MAP FOR AUTONOMOUS VEHICLE MARKET: RESEARCH DESIGN

FIGURE 3 RESEARCH DESIGN MODEL

2.2 SECONDARY DATA

2.2.1 KEY SECONDARY SOURCES FOR BASE NUMBERS (HD MAP FOR AUTONOMOUS VEHICLE)

2.2.2 KEY SECONDARY SOURCES FOR MARKET SIZING

2.2.3 KEY DATA FROM SECONDARY SOURCES

2.3 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.3.1 PRIMARY PARTICIPANTS

2.4 MARKET SIZE ESTIMATION

2.4.1 TOP-DOWN APPROACH

FIGURE 5 TOP-DOWN APPROACH: HD MAP FOR AUTONOMOUS VEHICLE MARKET

FIGURE 6 ILLUSTRATION OF HD MAP FOR AUTONOMOUS VEHICLE COMPANY REVENUE ESTIMATION

FIGURE 7 HD MAP FOR AUTONOMOUS VEHICLE MARKET: RESEARCH DESIGN & METHODOLOGY

- 2.4.2 DATA TRIANGULATION
- 2.5 MARKET BREAKDOWN
- 2.6 FACTOR ANALYSIS
- 2.7 ASSUMPTIONS
 - 2.7.1 KEY ASSUMPTIONS
 - 2.7.2 OTHER RESEARCH ASSUMPTIONS
- 2.8 RISK ASSESSMENT & RANGES
- TABLE 3 RISK ASSESSMENT & RANGES
- 2.9 RESEARCH LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 8 HD MAP FOR AUTONOMOUS VEHICLE MARKET: MARKET OVERVIEW

FIGURE 9 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION,
2021–2030

FIGURE 10 PERSONAL MOBILITY IS ESTIMATED TO LEAD THE HD MAP FOR THE
AUTONOMOUS VEHICLE MARKET FROM 2021 TO 2030

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES IN THE HD MAP FOR AUTONOMOUS VEHICLE
MARKET

FIGURE 11 INCREASING DEMAND FOR SEMI-AUTONOMOUS VEHICLES AND
RISING INVESTMENT FOR THE DEVELOPMENT OF AUTONOMOUS VEHICLE
WILL PROPEL THE HD MAP FOR AUTONOMOUS VEHICLE MARKET

4.2 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION

FIGURE 12 ASIA OCEANIA IS PROJECTED TO BE THE FASTEST GROWING
REGION IN HD MAP FOR AUTONOMOUS VEHICLE MARKET DURING 2021?2030

4.3 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, LEVEL OF
AUTOMATION & VEHICLE TYPE

FIGURE 13 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET,
BY LEVEL OF AUTOMATION & VEHICLE TYPE, 2021 VS 2030 (USD MILLION)

4.4 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE

FIGURE 14 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE,
2021 VS 2030 (USD MILLION)

4.5 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE

FIGURE 15 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE,
2021 VS 2030 (USD MILLION)

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 16 HD MAPS MARKET: MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Growing trend of autonomous driving

TABLE 4 INVESTMENT BY AUTOMOTIVE COMPANIES IN AUTONOMOUS TECHNOLOGY

5.2.1.2 Increasing adoption of Level 2 and Level 3 ADAS features in the automotive industry

5.2.1.3 Increasing investment by startups in the development of HD maps

TABLE 5 WORLDWIDE DISTRIBUTION OF STARTUPS BY TYPE OF EMBEDDED AUTONOMOUS TECHNOLOGY

5.2.1.4 Increasing partnerships and joint ventures by the key players

TABLE 6 HD MAP MARKET: PARTNERSHIPS/COLLABORATIONS IN HD MAPS ECOSYSTEM

TABLE 7 HD MAP MARKET: OEMS AND ITS HD MAPS SUPPLIERS

TABLE 8 HD MAP MARKET: KEY INVESTMENTS IN HD MAPS ECOSYSTEM

5.2.1.5 Growth in the map data collection

FIGURE 17 CLASSIFICATION OF DIFFERENT ROAD DETECTION APPROACHES DEPENDING ON THE SENSOR AND THE METHODOLOGY

FIGURE 18 DIFFERENT STRATEGIES FOR AUTONOMOUS DRIVING WITH ROAD-LEVEL NAVIGATION AND LANE-LEVEL NAVIGATION

5.2.1.6 Increasing investments in smart city projects

TABLE 9 SMART CITY INITIATIVES AND INVESTMENTS

5.2.2 RESTRAINTS

5.2.2.1 Limited standardization in HD maps

5.2.2.2 Less reliability in untested environments

5.2.3 OPPORTUNITIES

5.2.3.1 Autonomous car renting services

5.2.3.2 Advancement in 5G technology

FIGURE 19 5G TECHNOLOGY ECOSYSTEM

5.2.3.3 Increasing demand for real-time data

FIGURE 20 ARCHITECTURE OF REAL-TIME HD MAP CHANGE DETECTION

FIGURE 21 GENERAL STRUCTURE OF LOCALIZATION PROCEDURE

5.2.4 CHALLENGES

5.2.4.1 Legal & Privacy issues regarding HD maps

5.2.4.2 High cost of the technology and autonomous vehicle mapping

FIGURE 22 HD MAPPING PROCESS

5.2.4.3 Large size data collection, processing, and transmission of HD map data

FIGURE 23 DATA FROM AN AUTONOMOUS VEHICLE**5.3 PORTER'S FIVE FORCES****FIGURE 24 PORTER'S FIVE FORCES: HD MAP FOR AUTONOMOUS VEHICLE MARKET****5.3.1 THREAT OF NEW ENTRANTS**

5.3.1.1 The key players have collaborations with key OEMs

5.3.2 THREAT OF SUBSTITUTES**5.3.3 BARGAINING POWER OF BUYERS****5.3.4 BARGAINING POWER OF SUPPLIERS****5.3.5 RIVALRY AMONG EXISTING COMPETITORS**

5.3.5.1 Many HD map providers partnered to develop HD maps and HD mapping datasets

5.3.5.2 Increasing competition to broaden the customer base

5.4 ROADMAP OF HD MAP FOR AUTONOMOUS VEHICLE**FIGURE 25 ROADMAP OF HD MAP FOR AUTONOMOUS VEHICLE IN URBAN ENVIRONMENT****5.5 VALUE CHAIN ANALYSIS****FIGURE 26 VALUE CHAIN ANALYSIS OF HD MAP FOR AUTONOMOUS VEHICLE****5.6 ECOSYSTEM ANALYSIS****FIGURE 27 ECOSYSTEM ANALYSIS OF HD MAP FOR AUTONOMOUS VEHICLE****TABLE 10 LIST OF KEY PLAYER FROM HD MAP FOR AUTONOMOUS VEHICLE ECOSYSTEM****FIGURE 28 HD MAP FOR AUTONOMOUS VEHICLE ECOSYSTEM MATRIX****5.7 REGULATORY ANALYSIS OF RELATED MARKETS****5.7.1 GENERAL DATA PROTECTION REGULATION****5.7.2 ADAS: REGULATORY OVERVIEW**

5.7.2.1 Canada

5.7.2.2 US

5.7.2.3 European Parliament

5.7.2.4 National agency for automotive safety & victims' aid (NASVA), Japan

5.7.3 AUTONOMOUS VEHICLE: REGULATORY OVERVIEW

5.7.3.1 Enacted legislation and executive orders in the US

FIGURE 29 ENACTED LEGISLATION AND EXECUTIVE ORDERS IN THE US

5.7.3.2 Autonomous vehicle testing area in China

FIGURE 30 AUTONOMOUS VEHICLE TESTING AREA IN CHINA

5.7.3.3 Autonomous vehicle testing area in Germany

FIGURE 31 AUTONOMOUS VEHICLE TESTING AREA IN GERMANY

5.7.3.4 Autonomous vehicle testing area in Singapore

FIGURE 32 AUTONOMOUS VEHICLE TESTING AREA IN SINGAPORE

5.8 HD MAP FOR AUTONOMOUS VEHICLE MARKET, SCENARIOS (2021–2030)

FIGURE 33 HD MAP FOR AUTONOMOUS VEHICLE MARKET– FUTURE TRENDS & SCENARIOS, 2021–2030 (UNITS)

5.8.1 MOST LIKELY SCENARIO

TABLE 11 HD MAP FOR AUTONOMOUS VEHICLE MARKET (MOST LIKELY), BY REGION, 2021–2030 (UNITS)

5.8.2 OPTIMISTIC SCENARIO

TABLE 12 HD MAP FOR AUTONOMOUS VEHICLE MARKET (OPTIMISTIC SCENARIO), BY REGION, 2021–2030 (UNITS)

5.8.3 PESSIMISTIC SCENARIO

TABLE 13 HD MAP FOR AUTONOMOUS VEHICLE MARKET (PESSIMISTIC), BY REGION, 2021–2030 (UNITS)

6 INDUSTRY TRENDS

6.1 TECHNOLOGY OVERVIEW

FIGURE 34 FIVE ERAS OF VEHICLE SAFETY

FIGURE 35 CONNECTED VEHICLE FOR AUTONOMOUS DRIVING

6.1.1 HD MAPS PORTFOLIO FOR ALL AUTOMATION LEVELS

TABLE 14 AUTOMATION LEVELS

FIGURE 36 HD MAPS PORTFOLIO FOR ALL AUTOMATION LEVELS

6.1.2 HD MAP LAYERS

FIGURE 37 HD MAP LAYERS

6.1.3 COMPONENTS USED TO BUILD HD MAPS

6.1.3.1 Hardware

FIGURE 38 SENSORS AND THEIR IMPORTANCE IN AUTONOMOUS VEHICLES

6.1.3.1.1 LiDAR

6.1.3.1.2 Camera

6.1.3.1.3 Radar

6.1.3.1.4 Inertial Measurement Unit (IMU)

6.1.3.1.5 Global Positioning System (GPS)

6.1.3.2 Software

FIGURE 39 FLOW CHART FOR PRODUCTION PROCESS AND MAP DATA SOURCES

6.1.4 ADVANCEMENT IN SLAM ALGORITHM

6.1.5 SELF-HEALING MAPS

FIGURE 40 SELF-HEALING MAP PROCESS

6.1.6 MAPPING STANDARDS

FIGURE 41 FEATURES OF KEY MAPPING STANDARDS

6.1.6.1 SENSORIS

6.1.6.2 ADASIS

FIGURE 42 HD MAP STANDARDS

6.1.6.3 Navigation data standard

6.1.6.4 Vector tile 3

6.1.6.5 Open AutoDrive forum

6.1.7 HD 3D VIEWING CUSTOMER EXPERIENCE

6.1.8 EMERGENCE OF AI AND ML TECHNOLOGIES TO BOOST THE 3D

CONTENT ACCURACY

6.1.9 ADVENT OF 3D-ENABLED DISPLAY DEVICES FOR A BETTER NAVIGATION EXPERIENCE

6.1.10 3D MAPPING TECHNIQUES

6.1.10.1 Photogrammetry

6.1.10.2 LiDAR

6.1.10.3 RADAR

6.1.10.4 SONAR

FIGURE 43 IOT DEVICES IN AUTONOMOUS VEHICLES

6.1.11 HD MAPPING AND BLOCKCHAIN

6.1.12 MACHINE LEARNING POWERED ANALYTICS

6.1.13 SUPPLY CHAIN 4.0

6.1.14 LIDAR DRONES FOR MAPPING

FIGURE 44 LIDAR ECOSYSTEM: MAJOR VALUE ADDITION BY LIDAR COMPONENT MANUFACTURERS AND THEIR INTEGRATORS & DISTRIBUTORS

6.1.15 LOCATION OF THINGS

6.1.16 HD MAPPING FOR AUTONOMOUS VEHICLE PROVING GROUNDS

6.1.17 POTENTIAL APPLICATIONS OF HD MAPS OTHER THAN AUTONOMOUS VEHICLES

TABLE 15 BUSINESS MODEL FOR AUTONOMOUS LAST MILE DELIVERY

FIGURE 45 ALGORITHMS AND ANALYTICS SUPPORTING AUTONOMOUS LAST MILE DELIVERY

6.1.17.1 Aerial delivery drones

TABLE 16 EVOLUTION OF AERIAL DELIVERY DRONES

6.2 USE CASES: AERIAL DELIVERY DRONES

6.2.1 USE OF PROJECT WING OF ALPHABET TO DELIVER FOOD AND MEDICINES IN AUSTRALIA

6.2.2 REGULATORS APPROVE TRIAL FLIGHTS OF URBAN FLIGHT DELIVERY SYSTEMS OF DRONE DELIVERY CANADA

6.2.3 ELE.ME STARTS FOOD DELIVERY USING DRONES IN SHANGHAI

6.2.4 SF EXPRESS RECEIVED LICENSE TO START AERIAL DRONE-BASED NETWORK FOR DELIVERIES WITHIN PILOT ZONES OF CHINA

6.2.5 EMQOPTER DELIVERS FOOD PARCELS IN GERMANY USING AERIAL DELIVERY DRONES

6.2.6 SKYWAYS UAV OF AIRBUS HELICOPTERS CONDUCTS ITS FIRST PARCEL DELIVERY IN SINGAPORE

6.2.7 ZIPLINE PLANS TO DELIVER MEDICINES IN AFRICAN REGION USING AERIAL DELIVERY DRONES

6.2.8 DRONE DELIVERIES TO KING'S WALK GOLF COURSE IN GRAND FORKS, NORTH DAKOTA

6.2.9 AMAZON PLANS TO TRANSFORMING PARCEL DELIVERY USING PRIME AIR DELIVERY DRONE

6.2.10 DHL HAS SUCCESSFULLY COMPLETED TRAILS OF BVLOS MEDICINE DELIVERY FLIGHTS ACROSS LAKE VICTORIA, TANZANIA

6.2.10.1 Ground delivery vehicles

TABLE 17 EVOLUTION OF GROUND DELIVERY VEHICLES

6.3 USE CASES: GROUND DELIVERY VEHICLES

6.3.1 NURO AUTONOMOUS DELIVERY ROBOTS PROVIDING COST-EFFECTIVE GROCERY DELIVERY SERVICES FOR KROGER

6.3.2 KIWIBOTS DEPLOYED TO CARRY OUT LOW-COST FOOD DELIVERY SERVICES IN UNIVERSITY CAMPUSES IN CALIFORNIA

6.3.3 PEPSICO DELIVERING SNACKS TO COLLEGE STUDENTS BY A FLEET OF GROUND ROBOTS

6.3.4 FEDEX DELIVERS PARCELS USING SAMEDAY DELIVERY BOT

6.3.5 DOMINOS USING GROUND DELIVERY ROBOTS TO DELIVER PIZZA IN NEW ZEALAND

6.3.6 STARSHIP TECHNOLOGY OFFERING FOOD DELIVERIES AT GEORGE MASON UNIVERSITY'S FAIRFAX CAMPUS

6.3.7 JD.COM STARTED DELIVERIES USING AL EQUIPPED GROUND ROBOTS

6.3.8 AMAZON'S SCOUT GROUND ROBOT TO DELIVER PARCELS IN WASHINGTON

6.3.9 TYPES OF GNSS RECEIVERS

6.3.9.1 Global Positioning System (GPS)

6.3.9.2 Galileo

6.3.9.3 Global Navigation Satellite System (GLONASS)

6.3.9.4 Satellite-based Augmentation System (SBAS)

TABLE 18 SBAS IN DIFFERENT COUNTRIES

6.3.9.5 BeiDou Navigation Satellite System

6.3.10 GIS DATA

6.3.10.1 Types of GIS data models

6.3.10.1.1 Vector data model

6.3.10.1.2 Raster data model

6.3.10.2 Key trends in GIS

6.3.10.2.1 AR and VR technologies

6.3.10.2.2 Unmanned AERIAL Vehicles

6.3.10.2.3 Integration of cloud computing in GIS

6.3.10.2.4 Development of 4D GIS software and augmented reality platforms for GIS

7 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE

7.1 INTRODUCTION

7.2 RESEARCH METHODOLOGY

7.3 ASSUMPTIONS

TABLE 19 ASSUMPTIONS, BY SERVICE TYPE

FIGURE 46 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2021 VS 2030 (USD MILLION)

TABLE 20 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2020–2030 (USD MILLION)

7.4 MAPPING

TABLE 21 HD MAP SEMANTIC INFORMATION

TABLE 22 ROAD SEGMENT DATA (RSD) APPLICATIONS

TABLE 23 POTENTIALLY APPLICABLE MAPPING TECHNOLOGIES, THEIR STRENGTHS AND LIMITATIONS

TABLE 24 MAPWORKS SOFTWARE DEVELOPMENT KIT

7.4.1 THE COMPANIES OFFERING END TO END MAPPING SOLUTIONS FOR AUTONOMOUS VEHICLE IS EXPECTED TO DRIVE NORTH AMERICAN MARKET

TABLE 25 MAPPING: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

7.5 LOCALIZATION

TABLE 26 LOCALIZATION TECHNIQUES FOR AUTONOMOUS VEHICLE AND THEIR ACCURACY

TABLE 27 PRIOR INFORMATION IN HD MAP BASED VEHICLE LOCALIZATION

7.5.1 INCREASED INVESTMENT IN THE LOCALIZATION OF HD MAPS TO DRIVE THE MARKET

TABLE 28 LOCALIZATION: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

7.6 UPDATES & MAINTENANCE

7.6.1 NEED OF DYNAMIC TRAFFIC, WEATHER INFORMATION AND CONTINUOUSLY UPDATE IN DATA GATHERED BY MAPPING AND LOCALIZATION WILL DRIVE THE MARKET

TABLE 29 UPDATES & MAINTENANCE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

7.7 ADVERTISEMENT

7.7.1 ADVERTISEMENT IS PROJECTED TO BE THE FASTEST-GROWING SEGMENT OF HD MAPS FOR THE AUTONOMOUS VEHICLES MARKET

TABLE 30 ADVERTISEMENT: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

7.8 KEY INDUSTRY INSIGHTS

8 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY LEVEL OF AUTOMATION

8.1 INTRODUCTION

FIGURE 47 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY AUTOMATION LEVEL, 2021 VS. 2030 (USD MILLION)

8.2 RESEARCH METHODOLOGY

8.3 ASSUMPTIONS

TABLE 31 ASSUMPTIONS, BY LEVEL OF AUTOMATION TYPE

8.4 OPERATIONAL DATA

TABLE 32 RECENT AND ONGOING DEMONSTRATION AND TESTING OF CONNECTED AUTONOMOUS VEHICLES BY KEY COMPANIES

TABLE 33 ECONOMIC IMPACT OF CONNECTED AND AUTONOMOUS VEHICLE AND ITS BREAKDOWN

TABLE 34 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY AUTOMATION LEVEL, 2020–2030(USD MILLION)

8.5 SEMI-AUTONOMOUS DRIVING VEHICLES

8.5.1 LEVEL 2

8.5.2 LEVEL 3

8.5.3 ASIA OCEANIA REGION IS PROJECTED TO HAVE THE HIGHEST GROWTH RATE

TABLE 35 HD MAP FOR SEMI-AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

TABLE 36 HD MAP FOR SEMI-AUTONOMOUS VEHICLE MARKET, BY LEVEL OF AUTOMATION, 2020–2030 (USD MILLION)

8.6 AUTONOMOUS DRIVING VEHICLES

TABLE 37 EXPECTED TECHNOLOGY VS CURRENT TECHNOLOGY READINESS

LEVEL OF AUTONOMOUS VEHICLE

8.6.1 LEVEL 4 & 5 AUTONOMOUS VEHICLE DEVELOPMENT AND DEPLOYMENT

8.6.1.1 Daimler AG

8.6.1.2 TuSimple

8.6.1.3 Argo AI and Ford

8.6.1.4 Baidu

8.6.1.5 DiDi

8.6.1.6 Toyota, Pony.ai, and Hyundai

8.6.1.7 Waymo

8.6.1.8 Voyage

8.6.1.9 General Motors and Cruise

8.6.1.10 Volvo

8.6.1.11 Einride

8.6.2 LEVEL 4

8.6.3 LEVEL 5

8.6.4 TECHNOLOGY READINESS OF AUTONOMOUS VEHICLES IN THE EUROPE REGION IS EXPECTED TO DRIVE THE MARKET

TABLE 38 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

TABLE 39 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY LEVEL OF AUTOMATION, 2020–2030 (USD MILLION)

8.7 KEY INDUSTRY INSIGHTS

9 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE

9.1 INTRODUCTION

FIGURE 48 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2021 VS. 2030 (USD MILLION)

9.2 RESEARCH METHODOLOGY

9.3 ASSUMPTIONS

TABLE 40 ASSUMPTIONS: BY SOLUTION TYPE

TABLE 41 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2020–2030 (USD MILLION)

9.4 CLOUD-BASED

FIGURE 49 HD MAP PRODUCTION PIPELINE

9.4.1 HIGH FLEXIBILITY AND ACCURACY OFFERED BY CLOUD-BASED HD MAPS ARE EXPECTED TO DRIVE THE MARKET

TABLE 42 CLOUD-BASED: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

9.5 EMBEDDED

9.5.1 ASIA OCEANIA REGION OFFERS A HUGE OPPORTUNITY FOR THE GROWTH OF EMBEDDED HD MAPS

TABLE 43 EMBEDDED: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

9.6 KEY INDUSTRY INSIGHTS

10 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE

10.1 INTRODUCTION

FIGURE 50 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2021 VS. 2030 (USD MILLION)

TABLE 44 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2020–2030 (USD MILLION)

10.2 RESEARCH METHODOLOGY

10.3 ASSUMPTIONS

TABLE 45 ASSUMPTIONS, BY USAGE TYPE

10.4 OPERATIONAL DATA

TABLE 46 FEW POPULAR ROBO-TAXIS USED FOR PASSENGER TRANSPORTATION ACROSS THE WORLD

10.5 PERSONAL MOBILITY

10.5.1 NORTH AMERICA IS ESTIMATED TO BE THE LARGEST MARKET FOR THE PERSONAL MOBILITY SEGMENT

TABLE 47 PERSONAL MOBILITY: HD MAP FOR AUTONOMOUS VEHICLE, BY REGION, 2020–2030 (USD MILLION)

10.6 COMMERCIAL MOBILITY

10.6.1 INCREASING ADOPTION OF RIDE-SHARING SERVICES AND GROWING PARTNERSHIP BETWEEN KEY RIDE-SHARING COMPANIES WITH PROVIDERS OF HD MAPS WILL PROPEL THE MARKET COMMERCIAL MOBILITY SEGMENT

TABLE 48 COMMERCIAL MOBILITY: HD MAP FOR AUTONOMOUS VEHICLE, BY REGION, 2020–2030 (USD MILLION)

10.7 KEY INDUSTRY INSIGHTS

11 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE

11.1 INTRODUCTION

FIGURE 51 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2021 VS. 2030 (USD MILLION)

11.2 RESEARCH METHODOLOGY

11.3 ASSUMPTIONS

TABLE 49 ASSUMPTIONS: BY VEHICLE TYPE

11.4 OPERATIONAL DATA

TABLE 50 EXISTING PRODUCTS AND SOLUTIONS OFFERED BY HD MAP PROVIDERS

TABLE 51 FEW POPULAR AUTONOMOUS SHUTTLES FROM COMPANIES ACROSS THE WORLD

TABLE 52 TRUCK ROUTING ATTRIBUTES AND CONSIDERATIONS

TABLE 53 US HOURS OF SERVICE REGULATIONS

TABLE 54 KEY PLAYERS IN THE GLOBAL TRUCK PLATOONING MARKET

TABLE 55 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2020–2030 (USD MILLION)

11.5 PASSENGER CAR

11.5.1 THE PASSENGER CAR SEGMENT HOLDS THE LARGEST SHARE OF THE HD MAP FOR THE AUTONOMOUS VEHICLE MARKET

TABLE 56 PASSENGER CAR: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

11.6 COMMERCIAL VEHICLES

11.6.1 GROWING INVESTMENT BY TRUCK MANUFACTURERS IN AUTONOMOUS VEHICLE TECHNOLOGY TO DRIVE THE COMMERCIAL VEHICLE SEGMENT MARKET

TABLE 57 COMMERCIAL VEHICLE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

11.7 KEY INDUSTRY INSIGHTS

12 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION

12.1 INTRODUCTION

TABLE 58 NCAP REGULATIONS: US AND EUROPEAN UNION

TABLE 59 PHASES IN AUTONOMOUS VEHICLE DEVELOPMENT AND IMPACTS

FIGURE 52 HD MAPS FOR AUTONOMOUS MARKET, BY REGION, 2021 VS 2030 (USD MILLION)

TABLE 60 HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY REGION, 2020–2030 (USD MILLION)

12.2 NORTH AMERICA

FIGURE 53 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET SNAPSHOT

TABLE 61 NORTH AMERICA: AUTONOMOUS VEHICLE EFFORTS

TABLE 62 PHASES IN AUTONOMOUS VEHICLE DEVELOPMENT IN THE US AND

ITS IMPACT ON HD MAPS

TABLE 63 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2020–2030 (USD MILLION)

TABLE 64 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY AUTOMATION LEVEL, 2020–2030 (USD MILLION)

TABLE 65 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2020–2030 (USD MILLION)

TABLE 66 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2020–2030 (USD MILLION)

TABLE 67 NORTH AMERICA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2020–2030 (USD MILLION)

12.2.1 US

TABLE 68 US: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.2.2 MEXICO

TABLE 69 MEXICO: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.2.3 CANADA

TABLE 70 CANADA: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.3 ASIA OCEANIA

FIGURE 54 ASIA OCEANIA: SNAPSHOT

TABLE 71 ASIA OCEANIA: AUTONOMOUS VEHICLE EFFORTS

TABLE 72 ASIA OCEANIA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2020–2030 (USD MILLION)

TABLE 73 ASIA OCEANIA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY AUTOMATION LEVEL, 2020–2030 (USD MILLION)

TABLE 74 ASIA OCEANIA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2020–2030 (USD MILLION)

TABLE 75 ASIA OCEANIA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2020–2030 (USD MILLION)

TABLE 76 ASIA OCEANIA: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2020–2030 (USD MILLION)

12.3.1 CHINA

TABLE 77 CHINA: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

TABLE 78 KEY COMPANIES IN AUTONOMOUS VEHICLE TECHNOLOGY AND THEIR KNOWN PARTNERS IN CHINA

TABLE 79 CHINA AUTONOMOUS VEHICLE TESTING RECORDS

12.3.2 JAPAN

TABLE 80 JAPAN: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.3.3 INDIA

TABLE 81 INDIA: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.3.4 SOUTH KOREA

TABLE 82 SOUTH KOREA: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.4 EUROPE

FIGURE 55 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET SNAPSHOT

TABLE 83 EUROPE: EFFORTS TOWARDS AUTONOMOUS VEHICLES

TABLE 84 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2020–2030 (USD MILLION)

TABLE 85 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY LEVEL OF AUTOMATION, 2020–2030 (USD MILLION)

TABLE 86 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2020–2030 (USD MILLION)

TABLE 87 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2020–2030 (USD MILLION)

TABLE 88 EUROPE: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2020–2030 (USD MILLION)

12.4.1 GERMANY

TABLE 89 GERMANY: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.4.2 SPAIN

TABLE 90 SPAIN: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.4.3 ITALY

TABLE 91 ITALY: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.4.4 FRANCE

TABLE 92 FRANCE: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.4.5 UK

TABLE 93 UK: VEHICLE PRODUCTION DATA, 2019-2020 (UNITS)

12.5 ROW

FIGURE 56 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, 2021 VS. 2030 (USD MILLION)

TABLE 94 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY VEHICLE TYPE, 2020–2030 (USD MILLION)

TABLE 95 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY AUTOMATION LEVEL, 2020–2030 (USD MILLION)

TABLE 96 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY USAGE TYPE, 2020–2030 (USD MILLION)

TABLE 97 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SOLUTION TYPE, 2020–2030 (USD MILLION)

TABLE 98 ROW: HD MAP FOR AUTONOMOUS VEHICLE MARKET, BY SERVICE TYPE, 2020–2030 (USD MILLION)

12.5.1 BRAZIL

TABLE 99 BRAZIL: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.5.2 SOUTH AFRICA

TABLE 100 SOUTH AFRICA: VEHICLE PRODUCTION DATA, 2018-2020 (UNITS)

12.5.3 ISRAEL

13 COMPETITIVE LANDSCAPE

13.1 OVERVIEW

TABLE 101 OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN THE HD MAP FOR AUTONOMOUS VEHICLE MARKET

13.2 MARKET RANKING ANALYSIS

FIGURE 57 MARKET RANKING ANALYSIS: HD MAP FOR AUTONOMOUS VEHICLE MARKET

13.3 COMPETITIVE LEADERSHIP MAPPING

13.3.1 STARS

13.3.2 EMERGING LEADERS

13.3.3 PERVASIVE

13.3.4 PARTICIPANTS

FIGURE 58 HD MAPS FOR AUTONOMOUS VEHICLES MARKET: COMPETITIVE LEADERSHIP MAPPING, 2021

TABLE 102 HD MAPS FOR AUTONOMOUS VEHICLES MARKET: COMPANY FOOTPRINT, 2021

TABLE 103 HD MAPS FOR AUTONOMOUS VEHICLES MARKET: SOLUTION FOOTPRINT, 2021

TABLE 104 HD MAPS FOR AUTONOMOUS VEHICLES MARKET: REGIONAL FOOTPRINT, 2021

13.4 SME COMPETITIVE LEADERSHIP MAPPING

13.4.1 PROGRESSIVE COMPANIES

13.4.2 RESPONSIVE COMPANIES

13.4.3 DYNAMIC COMPANIES

13.4.4 STARTING BLOCKS

FIGURE 59 HD MAP FOR AUTONOMOUS VEHICLES MARKET: SME/STARTUP COMPETITIVE LEADERSHIP MAPPING, 2021

TABLE 105 WINNERS VS. TAIL-ENDERS

14 COMPANY PROFILES

(Business overview, Products offerings, Recent developments, Product launches, Deals, MNM view, Key strengths/Right to win, Strategic choices made, and

Weaknesses and competitive threats)*

14.1 NVIDIA

FIGURE 60 FEATURES OF NVIDIA DRIVE

TABLE 106 NVIDIA: BUSINESS OVERVIEW

FIGURE 61 NVIDIA: COMPANY SNAPSHOT

TABLE 107 NVIDIA: PRODUCT OFFERINGS

TABLE 108 NVIDIA: PRODUCT LAUNCHES

TABLE 109 NVIDIA: DEALS

14.2 TOMTOM

TABLE 110 MAPS OFFERED BY TOMTOM AND ITS FEATURES

TABLE 111 TOMTOM: BUSINESS OVERVIEW

FIGURE 62 TOMTOM: COMPANY SNAPSHOT

TABLE 112 TOMTOM: PRODUCT OFFERINGS

TABLE 113 TOMTOM: PRODUCT LAUNCHES

TABLE 114 TOMTOM: DEALS

14.3 HERE

TABLE 115 HERE: BUSINESS OVERVIEW

FIGURE 63 HERE: COMPANY SNAPSHOT

TABLE 116 HERE: PRODUCT OFFERINGS

TABLE 117 HERE HD: NEW PRODUCT DEVELOPMENTS

TABLE 118 HERE: DEALS

14.4 NAVINFO

TABLE 119 NAVINFO: BUSINESS OVERVIEW

FIGURE 64 NAVINFO: COMPANY SNAPSHOT

TABLE 120 MULTI-LAYER HD MAP BY NAVINFO

TABLE 121 NAVINFO: PRODUCT OFFERINGS

TABLE 122 NAVINFO: PRODUCT LAUNCHES

TABLE 123 NAVINFO: DEALS

14.5 CIVIL MAPS

TABLE 124 CIVIL MAPS: BUSINESS OVERVIEW

TABLE 125 CIVIL MAPS: PRODUCT OFFERINGS

TABLE 126 CIVIL MAPS: PRODUCT LAUNCHES

TABLE 127 CIVIL MAPS: DEALS

14.6 THE SANBORN MAP COMPANY

TABLE 128 THE SANBORN MAP COMPANY: BUSINESS OVERVIEW

TABLE 129 THE SANBORN MAP COMPANY: PRODUCT OFFERINGS

TABLE 130 THE SANBORN MAP COMPANY: PRODUCT LAUNCHES

TABLE 131 THE SANBORN MAP COMPANY: DEALS

14.7 MOMENTA

TABLE 132 MOMENTA: BUSINESS OVERVIEW

TABLE 133 MOMENTA: PRODUCT OFFERINGS

TABLE 134 MOMENTA : PRODUCT LAUNCHES

TABLE 135 MOMENTA: DEALS

14.8 NAVMII

TABLE 136 NAVMII: BUSINESS OVERVIEW

TABLE 137 NAVMII: PRODUCT/SOLUTION OFFERINGS

14.9 DYNAMIC MAP PLATFORM

TABLE 138 DYNAMIC MAP COMPANY: BUSINESS OVERVIEW

TABLE 139 DYNAMIC MAP COMPANY: PRODUCT/SOLUTION OFFERINGS

TABLE 140 DYNAMIC MAP PLATFORM: DEALS

14.10 MAPMYINDIA

TABLE 141 MAPMYINDIA: BUSINESS OVERVIEW

TABLE 142 MAPMYINDIA: PRODUCT/SOLUTION OFFERINGS

TABLE 143 MAPMYINDIA: DEALS

14.11 OTHER KEY PLAYERS

14.11.1 ASIA OCEANIA

14.11.1.1 RMSI

14.11.1.2 Zenrin

14.11.1.3 AutoNavi

14.11.1.4 Baidu

14.11.1.5 Woven Planet

14.11.2 EUROPE

14.11.2.1 Mapillary

14.11.2.2 Blickfeld

14.11.2.3 Geojunxion

14.11.3 NORTH AMERICA

14.11.3.1 CARMERA

14.11.3.2 Voxel Maps

14.11.4 ROW

14.11.4.1 Mobileye

*Details on Business overview, Products offerings, Recent developments, Product launches, Deals, MNM view, Key strengths/Right to win, Strategic choices made, and Weaknesses and competitive threats might not be captured in case of unlisted companies.

15 RECOMMENDATIONS BY MARKETSANDMARKETS

15.1 ASIA PACIFIC EXPECTED TO BE A FASTEST GROWING MARKET

HD Map for Autonomous Vehicles Market by Solution (Cloud-Based & Embedded), LOA(L2, L3, L4, & L5), Usage (Pass...

15.2 CLOUD-BASED HD MAP: KEY FOCUS AREA

15.3 GROWING ADOPTION OF HD MAPS FOR COMMERCIAL MOBILITY

15.4 CONCLUSION

16 APPENDIX

16.1 DISCUSSION GUIDE

16.2 KNOWLEDGE STORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

16.3 AVAILABLE CUSTOMIZATIONS

16.4 AUTHOR DETAILS

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