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LIDAR Market by Product (Aerial, Ground-Based, UAV, and Solid-State), Application (Corridor Mapping, Engineering, ADAS & Driverless Car, Exploration, Urban Planning, Cartography, & Meteorology), Component, Services, and Geography - Global Forecast to 2022

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Abstracts

“LiDAR market expected to exhibit rapid growth between 2017 and 2022”

The market was valued at USD 1,429.7 million in 2016 and is expected to reach USD 5,204.8 million by 2022, at a CAGR of 25.8% between 2017 and 2022. The major factors which drive the market are a rise in encouragement from the governments and institutes for the adoption of LiDAR, increasing application of LiDAR in engineering projects, and technological superiority of LiDAR technology.

“LiDAR market for ADAS and driverless cars is expected to grow at a rapid rate”

ADAS and driverless car application segment is expected to show remarkable growth during the forecast period. This growth can be attributed to the growing investment in the automotive industry for autonomous or driverless cars and increasing use of solid-state LiDAR in automotive applications for advanced driver assistance systems (ADAS).

“Solid-state LiDAR expected to hold the largest size of the LiDAR market during the forecast period”

The market for solid-state segment is expected to grow at the highest rate during the forecast period. Increasing investment in ADAS and driverless cars is a major factor

driving the market for solid-state LiDAR. Increasing application of solid-state LiDAR in the automotive industry is accelerating the speed of its development. Solid-state LiDAR systems are used to analyze and scan the environment; they make 3D images and process these images to perform controlling functions for driverless cars. Moreover, in ADAS application, they assist the driver in the driving process, ensuring safety and better driving.

“LiDAR market for laser scanners is expected to grow at a rapid pace between 2017 and 2022”

The market for laser scanners is expected to grow at the highest CAGR during the forecast period. The laser scanner is used to scan and to generate 3D images of the scanned areas. A rapid development of laser technology and increasing demand for LiDAR system contribute to the highest growth rate of the market for laser scanners. Laser scanners provide a high degree of accuracy, deliver better image quality, and can operate in extreme and challenging environments to collect, exploit, and distribute vital information efficiently.

“LiDAR market in North America expected to grow at the highest rate between 2017 and 2022”

The market in North America is expected to grow at the highest CAGR during the forecast period. Growing awareness, increasing adoption of LiDAR in various applications, and easy functionality, better quality, less complexity, and improved features are the factors fueling the growth of the market in the region.

Breakdown of the profile of primary participants:

By Company Type: Tier 1 = 55%, Tier 2 = 20%, and Tier 3 = 25%

By Designation: C-Level = 75%, and Managers = 25%

By Region: North America = 20%, APAC = 40%, Europe = 30% and RoW = 10%

Major players operating in the LiDAR market are Teledyne Optech Inc. (Canada), Leica Geosystems (Sweden), Riegl Laser Measurement Systems GmbH (Austria), Trimble Navigation Limited (U.S.), FARO Technologies (U.S.). Quantum Spatial (U.S.), Beijing Beike Technology Co., Ltd (isurestar) (China), Velodyne Lidar, Inc.(U.S.), Yellowscan

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(France), Geokno India Pvt. Ltd. (India), Trimble Inc. (U.S.), and SICK AG (Germany).

Research Coverage:

In this report, various segments such as product, application, component, services, and geography have been covered. It also discusses the drivers, restraints, opportunities, and challenges pertaining to the market. The report gives a detailed view of the market across four main regions: North America, Europe, APAC, and RoW. The Porter's five forces analysis has been included in the report, along with the description of each of its forces and their impact on the market.

Reasons to buy the report:

This report includes the market statistics pertaining to product, application, component, services, and geography.

The Porter's five forces framework has been utilized along with the value chain analysis to provide an in-depth insight into the LiDAR market.

Major drivers, restraints, challenges, and opportunities for the LiDAR market have been detailed in this report.

Illustrative segmentation, analysis, and forecast for markets based on product, application, component, services, and geography have been conducted to give an overall view of the market.

A detailed competitive landscape is given that includes key players, revenue of key players, and strategic developments.

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About

Report Description

The term ‘LiDAR’ is an acronym for Light Detection and Ranging, which has been derived from the common term ‘RADAR’. LiDAR technology has been around in the military and research circles since the early XXs. A typical LiDAR system mainly consists of three major components:- a laser sensor, a Global Positioning System (GPS) unit, and an inertial navigation unit. The LiDAR system sends out laser pulses at the object/area to be mapped, and collects data by recording the pulses reflected by/from the object. In certain instances, as many as XX such pulses are sent out every second.

Early LiDAR systems were very bulky and; thus, were very expensive to operate. In the last two decades, technological progress has brought the size of a LiDAR system down to a point where, LiDAR, as a technology, has become a very accurate and affordable solution. The advancement in the GPS and inertial navigation unit technologies has also propelled the LiDAR market further.

The report segments the LiDAR market on the basis of different types of products, technologies, components used, applications, and geographies. Further, it contains revenue forecast, and analyses trends in the market. The geographical analysis contains an in-depth classification for North America, Europe, and APAC; which consists of major countries covering the market. Further, the Middle-East and Latin America have been classified under the ROW region. Each of these geographies has been further split by the major countries existing in this market. The sections and the sub-segments in the report contain drivers, restraints, opportunities, current market trends, and the technologies expected to revolutionize the LiDAR domain. The report also gives detailed profiles of various companies, currently, active in these markets. In addition to the company profiles, the report does provide a Competitive Landscape (CL) of the key players for each of the markets. The CL covers market share analysis, mergers and acquisitions, collaborations, partnerships, new product developments, and the key growth strategies of each player.

Research Methodology

This research study involved the usage of extensive secondary sources, directories, and databases such as IEEE, WSTS, Hoovers, Bloomberg, Business-week, Factiva,

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OneSource, and so on; to identify and collect information useful for an extensive technical, market-oriented, and commercial study of this global market. The primary sources are mainly several industry experts from core and related industries; and preferred suppliers, manufacturers, distributors, administrators, solution providers, technology developers, alliances, standards & certification organizations from companies, and organizations related to all the segments of this industry's value chain. All the primary sources were interviewed to obtain and verify critical qualitative & quantitative information as well as to assess the future prospects.

Value Chain Analysis

The total value chain of the global LiDAR market when viewed from the electronics industry & semiconductor industry point of view, is a broad industry segment-related chain; a complex network/web interconnected between the various players related to the complete market, with several interconnections between them, along with flow of "value" in the form of goods & services.

The complete value chain of the LiDAR industry when classified into industry segments has two major streams – core industry segments and supporting industry segments. Goods & Service, in business terms— "value", flows among the various industry segments present between the starting point – the raw material suppliers, and the end point – the end-users; mainly, through the core industry segments, with exchange of value at several intermittent stages, along with the supporting industry segments.

Lidar Product Market Overview

Airborne, terrestrial, mobile, and short range LiDAR types are systems considered for the analysis.

The total revenue segmentation of LiDAR market by various product types is given in the table above. In 2012, the total LiDAR market was worth $XX million with maximum contribution from the airborne LiDAR type. One of the reasons for the highest share of airborne LiDAR is its high average selling price. Also, as compared to other types, airborne LiDAR market is mature and, thus, reliable. Thus, it is preferred by users for whom the budget is not a constraint. However, it can be observed that the airborne LiDAR market has the lowest CAGR in the product type list. This indicates the shift in trend in the LiDAR market. Due to the innovations in terrestrial and mobile LiDAR systems, the cost-benefit ratio for these LiDAR types has surpassed that of airborne LiDAR system. It can be said that the terrestrial and mobile LiDAR systems are

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disrupting the airborne LiDAR market to some extent. The forecasted data points for the year 2018 supports the analysis. In 2018, the mobile LiDAR system and terrestrial LiDAR system is expected to contribute $XX million and $XX million, respectively, to the total estimated market worth $XX million.

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