

Class 8 Truck ADAS Market in North America 2017-2022

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Abstracts

INTRODUCTION

Beyond ABS and ESC, both of which are profiting from government legislations, Adaptive cruise control is the most adopted ADAS, followed by Lane departure warning and Forward collision warning. A lot of OEMs have now made Collision mitigation systems as standard fitment on their on-highway models. Collision mitigation systems have the potential to reduce an accident severity by more than 90%. This is one of the prime reasons why it has seen such wide adoption of late. Lane departure warning and forward collision warning don't offer the same amount of value addition as collision mitigation system. Therefore they are lagging behind.

The adoption of ADAS will become even more important in future, as we inch closer to autonomous trucks. The commercial and safety benefits of autonomous trucks are too big to be ignored and there is no doubt that ADAS will play a pivotal role in getting there.

MARKET DYNAMICS

As we all know the idea of autonomous trucks is getting popular with every passing day but to some, it might seem far-fetched and that's where the concept of truck platooning comes in. The idea of getting goods delivered by four trucks but utilizing only one driver in the lead vehicle is actually an irresistible proposition. It might also act as a bridge between the drivered truck and driverless truck just the way we are moving to pure electric vehicles using hybrids as a bridge. The platooned trucks could be driven on the arrow straight Interstate highways of the US and drivers can be used to navigate them into the cities before reaching the end of the trip. It will also take care of the safety angle involved in these high-value vehicles.

MARKET SIZE AND FORECAST

Bendix Wingman Advanced is one of the most popular collision mitigation systems available in the North American market. It is widely specced on all best-selling on-highway tractors of Kenworth, Peterbilt, Volvo and International. WABCO's OnGuard collision mitigation system ranked second in popularity, utilized by 193 fleets and close to 140,000 units sold between 2007-2017.

As per our discussion with fleet operators, we heard many positive reviews about XX as opposed to XX collision mitigation system which has a major shortcoming of creating false alarms. The market penetration of collision mitigation system was approximately XX% in 2017. Among all the ADAS technologies studied for this report, collision mitigation system is expected the highest growth rate of XX% during next 5 years. As per our estimates, the cost of a collision mitigation system in North America was approximately \$XX in 2017.

COMPETITIVE LANDSCAPE

The competitive landscape of ADAS suppliers in North America resembles the competitive landscape of Class 8 truck manufacturers. The market is completely consolidated reflecting upon the fact that the barriers to entry in this market is quite high. XX and YY collectively make up for more than 70% of the market. Detroit Assurance is a suite of safety technologies by Daimler Trucks North America, which is completely vertically integrated, supplying only to Daimler. WABCO is the leader in ABS and a leading supplier to Daimler trucks North America. Barring ABS, WABCO doesn't have much presence in the ADAS market.

THIS REPORT WILL ANSWER FOLLOWING QUESTIONS

1. The market size (both volume and value) of ADAS in Class 8 trucks in North America in 2017-2022 and every year in between?
2. The impact of upcoming mandates on this market
3. The market size and forecast of Class 8 truck market in North America segmented by US, Canada and Mexico- Volume and Value
4. The market size and forecast segmented by end use segments (Vocational and Line haul)- Volume and Value
5. The market size and forecast segmented by technology- Volume and Value
6. Latest trends in all truck segments

7. Market share and future strategy of Tier 1 ADAS suppliers

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