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HD Maps Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Component (Hardware, Software, Services), By Deployment (On-Cloud and On-Premises), By End-User (Automotive, Defense & Aerospace, Internet Service Providers and Others), By Region, By Competition 2019-2029F

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Abstracts

Global HD Maps Market was valued at USD 19.89 billion in 2023 and is expected to reach USD 34.09 billion by 2029 with a CAGR of 9.23% during the forecast period. The HD Maps Market refers to the sector that specializes in the development and provision of high-definition (HD) mapping solutions, which are crucial for enabling advanced navigation and localization technologies, particularly in the context of autonomous vehicles, smart cities, and location-based services. HD maps differ from traditional maps by providing a much higher level of detail and accuracy, including lane configurations, road signs, traffic signals, and 3D representations of the environment. These maps are generated through a combination of techniques, including LIDAR (Light Detection and Ranging), photogrammetry, and computer vision, often utilizing data collected from a variety of sensors mounted on vehicles or drones. The HD maps are designed to be continuously updated to reflect real-time changes in the environment, such as road constructions, alterations in traffic patterns, and modifications in infrastructure, ensuring that users have access to the most current and precise information.

Key Market Drivers

Increasing Demand for Autonomous Vehicles

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The growing demand for autonomous vehicles is a primary driver for the Global HD Maps market. As automakers and technology companies invest heavily in developing self-driving technologies, the need for precise, high-definition maps becomes critical. HD maps provide detailed geographic information that includes lane markings, traffic signals, road curvature, and other essential data that enable autonomous vehicles to navigate safely and efficiently. Unlike traditional maps, HD maps are updated in real-time and provide a three-dimensional view of the environment, allowing for enhanced situational awareness. This level of detail is vital for the successful deployment of advanced driver-assistance systems (ADAS) and fully autonomous driving capabilities. Furthermore, the increasing focus on safety and regulatory compliance in the automotive industry compels manufacturers to integrate HD mapping technologies into their vehicles. As the market for electric and autonomous vehicles expands, the demand for HD maps is expected to rise correspondingly, driving innovation and investment in mapping technologies.

Growth of Smart Cities and Infrastructure

The rapid development of smart cities is another significant driver for the Global HD Maps market. As urban populations grow, city planners and governments are increasingly adopting smart technologies to improve infrastructure efficiency, transportation systems, and overall urban living conditions. HD maps play a crucial role in this transformation by providing accurate data for traffic management, urban planning, and public transportation systems. With detailed maps, city planners can analyze traffic patterns, optimize public transit routes, and implement smart traffic signals to reduce congestion and enhance mobility. Additionally, HD maps facilitate the deployment of connected vehicles, which can communicate with each other and with infrastructure elements like traffic lights, thereby improving road safety and efficiency. The integration of HD mapping into smart city initiatives not only enhances the functionality of urban infrastructure but also contributes to sustainability efforts by promoting efficient resource usage and reducing carbon footprints. As smart city projects proliferate worldwide, the demand for HD maps is set to surge, creating significant opportunities for market growth.

Advancements in GIS Technology

Advancements in Geographic Information Systems (GIS) technology significantly drive the growth of the Global HD Maps market. The continuous evolution of GIS capabilities enhances the quality and accessibility of geographic data, making it easier for

businesses and organizations to create and maintain HD maps. Innovations such as cloud computing, machine learning, and artificial intelligence have revolutionized how geographic data is collected, processed, and analyzed. For instance, machine learning algorithms can automate the extraction of features from satellite imagery, enabling faster and more accurate map creation. Additionally, real-time data processing capabilities allow for dynamic map updates, ensuring that users have access to the most current information. This is particularly important in industries such as logistics, where route optimization based on up-to-date traffic conditions can lead to significant cost savings. Furthermore, the integration of GIS with other technologies, such as IoT and big data analytics, allows for more comprehensive insights and applications. As organizations increasingly recognize the value of high-definition geographic data for decision-making and operational efficiency, the HD Maps market is poised for substantial growth driven by these technological advancements.

Key Market Challenges

Data Collection and Maintenance

One of the primary challenges facing the Global HD Maps Market is the complexity and cost associated with data collection and maintenance. High-definition maps require extensive datasets that include not only the static features of the environment—like roads, lanes, traffic signals, and geographic landmarks—but also dynamic information such as traffic patterns and conditions, weather influences, and temporary road changes (e.g., construction or accidents). The process of collecting this data is inherently labor-intensive and necessitates sophisticated technologies, including LiDAR, cameras, and GPS systems, to achieve the precision required for HD mapping. Furthermore, the need for continuous updates presents another layer of complexity; as urban environments evolve, maps must be regularly refreshed to maintain their accuracy and relevance. This can result in substantial operational costs for companies in the sector, which may struggle to keep up with the rapid pace of changes in infrastructure. Additionally, ensuring the data's accuracy and completeness is critical, as errors in HD maps can lead to severe consequences for autonomous vehicles and navigation systems. The challenge is exacerbated by the varied regulations across regions regarding data collection, as companies must navigate compliance with local laws and privacy concerns related to the capture of sensitive information. Moreover, establishing partnerships with local municipalities and transportation authorities can be challenging, as these entities often have different priorities and requirements. Companies must invest in not only the technology for data acquisition but also in building relationships and frameworks for data sharing to enhance their mapping

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products. Overall, the intricate nature of data collection and maintenance poses a significant challenge to the scalability and sustainability of the HD Maps Market, requiring companies to innovate continuously and invest strategically to remain competitive.

Technological Integration and Standardization

Another significant challenge in the Global HD Maps Market revolves around the integration of diverse technologies and the lack of industry-wide standards. As the market expands, various stakeholders—including automotive manufacturers, tech companies, and mapping service providers—utilize different technologies, platforms, and data formats. This fragmentation leads to compatibility issues, making it difficult for businesses to seamlessly integrate HD maps into existing systems, such as autonomous driving platforms, vehicle navigation systems, and various transportation applications. Each player may have unique algorithms, data processing methods, and update mechanisms, which can complicate collaboration and data sharing. Furthermore, without standardized protocols for HD map creation, data exchange, and updates, it becomes challenging for companies to ensure interoperability, thereby hindering the development of cohesive solutions that meet the needs of all users. The absence of industry standards can also stifle innovation, as companies may hesitate to invest in new technologies or processes that might not align with the practices of their competitors. In addition, the need for real-time updates further complicates the integration process, as data from multiple sources must be synchronized and harmonized to provide accurate and timely information. This challenge is particularly evident in urban environments, where traffic conditions and road layouts can change rapidly. The lack of a unified approach can lead to inconsistent user experiences and reduce consumer trust in HD mapping solutions. To address this challenge, stakeholders in the HD Maps Market must collaborate to establish common standards and protocols that facilitate technological integration and interoperability. Such efforts would not only enhance the quality and usability of HD maps but also foster a more cohesive and innovative ecosystem that can accelerate market growth and adoption.

Key Market Trends

Integration of HD Maps with Autonomous Vehicles

The integration of HD maps with autonomous vehicles is one of the most significant trends shaping the Global HD Maps Market. As the automotive industry rapidly shifts toward automation and connected vehicle technology, the demand for highly accurate

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and detailed mapping solutions has surged. HD maps provide critical information about road infrastructure, including lane boundaries, traffic signals, and obstacles, which are essential for the safe navigation of autonomous vehicles. Unlike traditional maps, HD maps are updated frequently to reflect real-time changes in the environment, ensuring that autonomous systems can make informed decisions while driving. This integration is further enhanced by advancements in sensor technology, such as LiDAR and radar, which allow for the collection of precise geospatial data to be incorporated into HD maps. Additionally, partnerships between automotive manufacturers, technology firms, and mapping companies are becoming more prevalent, driving innovation and accelerating the development of HD mapping solutions. As autonomous vehicle technology continues to evolve, the reliance on HD maps for enhanced navigation and safety will only grow, creating substantial opportunities for businesses involved in this sector.

Expansion of Mapping Technologies and Data Analytics

The Global HD Maps Market is also witnessing an expansion of mapping technologies and data analytics, which is transforming how geographic information is collected, processed, and utilized. Advances in artificial intelligence, machine learning, and cloud computing are enhancing the capabilities of HD mapping solutions, enabling more efficient data collection and analysis. For instance, AI algorithms can process vast amounts of data collected from various sources, including cameras, sensors, and user-generated content, to create and update HD maps quickly and accurately. This capability is particularly valuable in rapidly changing environments, where traditional mapping methods may lag. Moreover, the rise of data analytics allows businesses to extract actionable insights from HD map data, facilitating better decision-making for a wide range of applications, from urban planning to logistics and supply chain management. As organizations increasingly recognize the value of geospatial data in driving operational efficiency and strategic planning, the demand for advanced HD mapping technologies will continue to grow. This trend not only expands the market for HD maps but also encourages innovation in related fields, fostering collaboration between mapping companies, technology providers, and end-users across various industries.

Segmental Insights

Deployment Insights

The On-Cloud segment held the largest Market share in 2023. The HD Maps market,

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particularly in the on-cloud segment, is experiencing robust growth driven by several key factors that align with the increasing demand for precision and real-time data in various applications. As autonomous vehicles and advanced driver-assistance systems (ADAS) continue to evolve, the necessity for high-definition mapping solutions becomes more critical. Cloud-based HD maps offer unparalleled scalability and accessibility, allowing manufacturers and developers to update and distribute maps seamlessly across multiple platforms and vehicles. This is particularly advantageous in the context of rapidly changing environments, where real-time updates to road conditions, construction, and obstacles can significantly enhance navigation accuracy and safety. Moreover, the integration of artificial intelligence (AI) and machine learning with cloud technologies facilitates the continuous improvement of map data through advanced analytics and data processing capabilities. This enables more accurate localization, which is crucial for the functioning of autonomous vehicles. The on-cloud segment also allows for collaborative mapping efforts, where data collected from numerous vehicles can be aggregated and analyzed to refine map accuracy and detail further. This community-driven approach not only enhances map quality but also reduces the burden of data management for individual users and manufacturers. As smart cities gain traction worldwide, the demand for interconnected systems that utilize HD maps for efficient traffic management and urban planning is increasing. On-cloud HD maps can play a vital role in supporting these smart city initiatives by providing detailed and up-to-date geographical information that helps city planners and traffic authorities make informed decisions.

The growing adoption of the Internet of Things (IoT) and connected devices is creating a surge in demand for HD maps that can seamlessly integrate with various smart applications, enhancing user experiences across different sectors, including transportation, logistics, and tourism. The cost-effectiveness of cloud solutions also contributes significantly to the market's growth, as businesses can reduce infrastructure investments and maintenance costs while benefiting from the flexibility and scalability of cloud-based services. As companies increasingly shift toward subscription-based models, the on-cloud segment is becoming an attractive option for accessing HD mapping solutions without significant upfront capital expenditures. The rising awareness of environmental sustainability is influencing the HD Maps market, as cloud-based solutions can lead to reduced energy consumption and carbon footprints compared to traditional data centers. This aligns with global sustainability goals and drives the demand for cloud-based HD mapping services that support eco-friendly practices. Overall, the convergence of technological advancements, the need for real-time data, and the growing trend of interconnected smart systems are propelling the HD Maps market in the on-cloud segment, presenting numerous opportunities for innovation and

growth in the coming years. As businesses and cities increasingly rely on accurate and dynamic mapping solutions, cloud-based HD maps are poised to become a foundational element of future transportation and urban infrastructure development.

Regional Insights

North America region held the largest market share in 2023. The HD Maps market in the North America region is primarily driven by the rapid advancements in autonomous vehicle technology and the increasing demand for high-precision mapping solutions. With the automotive industry shifting towards autonomous driving, there is a heightened need for detailed and accurate maps that can support navigation and situational awareness for self-driving vehicles. These maps offer enhanced spatial data, allowing vehicles to recognize and respond to complex environments, including lane markings, traffic signs, and obstacles. Moreover, the proliferation of connected vehicles and the Internet of Things (IoT) is further propelling the need for HD maps, as these vehicles require real-time updates to operate safely and efficiently. As regulatory bodies and automotive manufacturers prioritize safety and innovation in autonomous driving systems, the demand for HD mapping technologies is expected to escalate. The integration of artificial intelligence and machine learning in map data processing is enhancing the capabilities of HD maps, allowing for more dynamic and adaptive navigation systems. This technological evolution is attracting significant investments from various stakeholders, including tech companies and automotive giants, further stimulating market growth. The rise of smart cities in North America also plays a crucial role in the HD Maps market, as urban planners and local governments seek to leverage detailed mapping data for traffic management, urban mobility, and infrastructure development.

The demand for improved driver assistance systems (ADAS) is driving the adoption of HD maps in commercial vehicles, where safety and efficiency are paramount. As fleet operators increasingly turn to technology for optimization, HD maps become indispensable for route planning and management, thus broadening the market's application spectrum. Moreover, partnerships and collaborations among map providers, automotive manufacturers, and technology firms are facilitating the development of comprehensive mapping solutions tailored to meet the specific needs of the evolving automotive landscape. The increasing penetration of electric vehicles (EVs) in North America is another factor contributing to the HD Maps market, as these vehicles often incorporate advanced navigation features that rely on precise mapping data to enhance efficiency and performance. The growing emphasis on environmental sustainability and fuel efficiency is driving the need for optimized routing solutions that HD maps can

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provide, thereby promoting energy savings and reduced emissions. In summary, the HD Maps market in North America is experiencing robust growth fueled by advancements in autonomous driving technology, the rise of smart cities, and the increasing integration of IoT in the automotive sector. As the demand for accurate and real-time mapping solutions continues to rise, key stakeholders in the industry are well-positioned to capitalize on emerging opportunities, ensuring a prosperous future for the HD Maps market in the region.

Key Market Players

TomTom International BV

HERE Global B.V.

Waymo LLC

Mapbox Inc.

Dynamic Map Platform Co., Ltd.

NVIDIA Corporation

NavInfo Europe B.V.

The Sanborn Map Company, Inc.

Report Scope:

In this report, the Global HD Maps Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

HD Maps Market, By Component:

Hardware

Software

Services

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HD Maps Market, By Deployment:

On-Cloud

On-Premises

HD Maps Market, By End-User:

Automotive

Defense & Aerospace

Internet Service Providers

Others

HD Maps Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

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Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global HD Maps Market.

Available Customizations:

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Global HD Maps Market report with the given Market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional Market players (up to five).

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Contents

1. PRODUCT OVERVIEW

1.1. Market Definition
1.2. Scope of the Market
  1.2.1. Markets Covered
  1.2.2. Years Considered for Study
1.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

2.1. Objective of the Study
2.2. Baseline Methodology
2.3. Formulation of the Scope
2.4. Assumptions and Limitations
2.5. Sources of Research
  2.5.1. Secondary Research
  2.5.2. Primary Research
2.6. Approach for the Market Study
  2.6.1. The Bottom-Up Approach
  2.6.2. The Top-Down Approach
2.7. Methodology Followed for Calculation of Market Size & Market Shares
2.8. Forecasting Methodology
  2.8.1. Data Triangulation & Validation

3. EXECUTIVE SUMMARY

4. VOICE OF CUSTOMER

5. GLOBAL HD MAPS MARKET OUTLOOK

5.1. Market Size & Forecast
  5.1.1. By Value
5.2. Market Share & Forecast
  5.2.1. By Component (Hardware, Software, Services)
  5.2.2. By Deployment (On-Cloud and On-Premises)
  5.2.3. By End-User (Automotive, Defense & Aerospace, Internet Service Providers and Others)

+44 20 8123 2220
info@marketpublishers.com

5.2.4. By Company (2023)
5.2.5. Market Map

6. NORTH AMERICA HD MAPS MARKET OUTLOOK

6.1. Market Size & Forecast
6.1.1. By Value
6.2. Market Share & Forecast
6.2.1. By Component
6.2.2. By Deployment
6.2.3. By End-User
6.2.4. By Country
6.3. North America: Country Analysis
6.3.1. United States HD Maps Market Outlook
6.3.1.1. Market Size & Forecast
6.3.1.1.1. By Value
6.3.1.2. Market Share & Forecast
6.3.1.2.1. By Component
6.3.1.2.2. By Deployment
6.3.1.2.3. By End-User
6.3.2. Canada HD Maps Market Outlook
6.3.2.1. Market Size & Forecast
6.3.2.1.1. By Value
6.3.2.2. Market Share & Forecast
6.3.2.2.1. By Component
6.3.2.2.2. By Deployment
6.3.2.2.3. By End-User
6.3.3. Mexico HD Maps Market Outlook
6.3.3.1. Market Size & Forecast
6.3.3.1.1. By Value
6.3.3.2. Market Share & Forecast
6.3.3.2.1. By Component
6.3.3.2.2. By Deployment
6.3.3.2.3. By End-User

7. EUROPE HD MAPS MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value

+44 20 8123 2220
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7.2. Market Share & Forecast
7.2.1. By Component
7.2.2. By Deployment
7.2.3. By End-User
7.2.4. By Country
7.3. Europe: Country Analysis
7.3.1. Germany HD Maps Market Outlook
7.3.1.1. Market Size & Forecast
7.3.1.1.1. By Value
7.3.1.2. Market Share & Forecast
7.3.1.2.1. By Component
7.3.1.2.2. By Deployment
7.3.1.2.3. By End-User
7.3.2. United Kingdom HD Maps Market Outlook
7.3.2.1. Market Size & Forecast
7.3.2.1.1. By Value
7.3.2.2. Market Share & Forecast
7.3.2.2.1. By Component
7.3.2.2.2. By Deployment
7.3.2.2.3. By End-User
7.3.3. Italy HD Maps Market Outlook
7.3.3.1. Market Size & Forecast
7.3.3.1.1. By Value
7.3.3.2. Market Share & Forecast
7.3.3.2.1. By Component
7.3.3.2.2. By Deployment
7.3.3.2.3. By End-User
7.3.4. France HD Maps Market Outlook
7.3.4.1. Market Size & Forecast
7.3.4.1.1. By Value
7.3.4.2. Market Share & Forecast
7.3.4.2.1. By Component
7.3.4.2.2. By Deployment
7.3.4.2.3. By End-User
7.3.5. Spain HD Maps Market Outlook
7.3.5.1. Market Size & Forecast
7.3.5.1.1. By Value
7.3.5.2. Market Share & Forecast
7.3.5.2.1. By Component

+44 20 8123 2220
info@marketpublishers.com

7.3.5.2.2. By Deployment
7.3.5.2.3. By End-User

8. ASIA-PACIFIC HD MAPS MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Component
8.2.2. By Deployment
8.2.3. By End-User
8.2.4. By Country
8.3. Asia-Pacific: Country Analysis
8.3.1. China HD Maps Market Outlook
8.3.1.1. Market Size & Forecast
8.3.1.1.1. By Value
8.3.1.2. Market Share & Forecast
8.3.1.2.1. By Component
8.3.1.2.2. By Deployment
8.3.1.2.3. By End-User
8.3.2. India HD Maps Market Outlook
8.3.2.1. Market Size & Forecast
8.3.2.1.1. By Value
8.3.2.2. Market Share & Forecast
8.3.2.2.1. By Component
8.3.2.2.2. By Deployment
8.3.2.2.3. By End-User
8.3.3. Japan HD Maps Market Outlook
8.3.3.1. Market Size & Forecast
8.3.3.1.1. By Value
8.3.3.2. Market Share & Forecast
8.3.3.2.1. By Component
8.3.3.2.2. By Deployment
8.3.3.2.3. By End-User
8.3.4. South Korea HD Maps Market Outlook
8.3.4.1. Market Size & Forecast
8.3.4.1.1. By Value
8.3.4.2. Market Share & Forecast
8.3.4.2.1. By Component

+44 20 8123 2220
info@marketpublishers.com

8.3.4.2.2. By Deployment
8.3.4.2.3. By End-User
8.3.5. Australia HD Maps Market Outlook
8.3.5.1. Market Size & Forecast
8.3.5.1.1. By Value
8.3.5.2. Market Share & Forecast
8.3.5.2.1. By Component
8.3.5.2.2. By Deployment
8.3.5.2.3. By End-User

9. SOUTH AMERICA HD MAPS MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Component
9.2.2. By Deployment
9.2.3. By End-User
9.2.4. By Country
9.3. South America: Country Analysis
9.3.1. Brazil HD Maps Market Outlook
9.3.1.1. Market Size & Forecast
9.3.1.1.1. By Value
9.3.1.2. Market Share & Forecast
9.3.1.2.1. By Component
9.3.1.2.2. By Deployment
9.3.1.2.3. By End-User
9.3.2. Argentina HD Maps Market Outlook
9.3.2.1. Market Size & Forecast
9.3.2.1.1. By Value
9.3.2.2. Market Share & Forecast
9.3.2.2.1. By Component
9.3.2.2.2. By Deployment
9.3.2.2.3. By End-User
9.3.3. Colombia HD Maps Market Outlook
9.3.3.1. Market Size & Forecast
9.3.3.1.1. By Value
9.3.3.2. Market Share & Forecast
9.3.3.2.1. By Component

+44 20 8123 2220
info@marketpublishers.com

9.3.3.2.2. By Deployment
9.3.3.2.3. By End-User

10. MIDDLE EAST AND AFRICA HD MAPS MARKET OUTLOOK

10.1. Market Size & Forecast
10.1.1. By Value
10.2. Market Share & Forecast
10.2.1. By Component
10.2.2. By Deployment
10.2.3. By End-User
10.2.4. By Country
10.3. Middle East and Africa: Country Analysis
10.3.1. South Africa HD Maps Market Outlook
10.3.1.1. Market Size & Forecast
10.3.1.1.1. By Value
10.3.1.2. Market Share & Forecast
10.3.1.2.1. By Component
10.3.1.2.2. By Deployment
10.3.1.2.3. By End-User
10.3.2. Saudi Arabia HD Maps Market Outlook
10.3.2.1. Market Size & Forecast
10.3.2.1.1. By Value
10.3.2.2. Market Share & Forecast
10.3.2.2.1. By Component
10.3.2.2.2. By Deployment
10.3.2.2.3. By End-User
10.3.3. UAE HD Maps Market Outlook
10.3.3.1. Market Size & Forecast
10.3.3.1.1. By Value
10.3.3.2. Market Share & Forecast
10.3.3.2.1. By Component
10.3.3.2.2. By Deployment
10.3.3.2.3. By End-User
10.3.4. Kuwait HD Maps Market Outlook
10.3.4.1. Market Size & Forecast
10.3.4.1.1. By Value
10.3.4.2. Market Share & Forecast
10.3.4.2.1. By Component

+44 20 8123 2220
info@marketpublishers.com

10.3.4.2.2. By Deployment
10.3.4.2.3. By End-User
10.3.5. Turkey HD Maps Market Outlook
10.3.5.1. Market Size & Forecast
10.3.5.1.1. By Value
10.3.5.2. Market Share & Forecast
10.3.5.2.1. By Component
10.3.5.2.2. By Deployment
10.3.5.2.3. By End-User

11. MARKET DYNAMICS

11.1. Drivers
11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. COMPANY PROFILES

13.1. TomTom International BV
13.1.1. Business Overview
13.1.2. Key Revenue and Financials
13.1.3. Recent Developments
13.1.4. Key Personnel/Key Contact Person
13.1.5. Key Product/Services Offered
13.2. HERE Global B.V.
13.2.1. Business Overview
13.2.2. Key Revenue and Financials
13.2.3. Recent Developments
13.2.4. Key Personnel/Key Contact Person
13.2.5. Key Product/Services Offered
13.3. Waymo LLC
13.3.1. Business Overview
13.3.2. Key Revenue and Financials
13.3.3. Recent Developments
13.3.4. Key Personnel/Key Contact Person
13.3.5. Key Product/Services Offered
13.4. Mapbox Inc.
13.4.1. Business Overview

+44 20 8123 2220
info@marketpublishers.com

13.4.2. Key Revenue and Financials
13.4.3. Recent Developments
13.4.4. Key Personnel/Key Contact Person
13.4.5. Key Product/Services Offered
13.5. Dynamic Map Platform Co., Ltd.
13.5.1. Business Overview
13.5.2. Key Revenue and Financials
13.5.3. Recent Developments
13.5.4. Key Personnel/Key Contact Person
13.5.5. Key Product/Services Offered
13.6. NVIDIA Corporation
13.6.1. Business Overview
13.6.2. Key Revenue and Financials
13.6.3. Recent Developments
13.6.4. Key Personnel/Key Contact Person
13.6.5. Key Product/Services Offered
13.7. NavInfo Europe B.V.
13.7.1. Business Overview
13.7.2. Key Revenue and Financials
13.7.3. Recent Developments
13.7.4. Key Personnel/Key Contact Person
13.7.5. Key Product/Services Offered
13.8. The Sanborn Map Company, Inc.
13.8.1. Business Overview
13.8.2. Key Revenue and Financials
13.8.3. Recent Developments
13.8.4. Key Personnel/Key Contact Person
13.8.5. Key Product/Services Offered

14. STRATEGIC RECOMMENDATIONS

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