

# **On Board Magnetic Sensor Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Hall Effect Sensors, Magneto-resistive Sensors, SQUID Sensors, Others), By Magnetic Density (Less than 1microgauss, 1microgauss-10gauss, Above 10gauss), By Application (Speed Sensing, Detection, Position Sensing, Navigation, Electric Compass), By Industry Vertical (Consumer Electronics, Automotive, Industrial, Aerospace and Defense, Healthcare, Others), By Region, By Competition, 2018-2028**

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## **Abstracts**

Global On Board Magnetic Sensor Market was valued at USD 2.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.19% through 2028.

The On-Board Magnetic Sensor market refers to the segment of the global sensor industry that specializes in the development, manufacturing, and distribution of magnetic sensors integrated into various electronic devices, machinery, and systems. These sensors are designed to detect and measure magnetic fields and are employed in a wide range of applications, including but not limited to automotive, consumer electronics, industrial automation, aerospace, and healthcare.

On-Board Magnetic Sensors play a crucial role in modern technology, providing essential functionalities such as position sensing, motion tracking, and safety features.

They enable accurate and precise measurement of magnetic properties, ensuring that electronic systems can operate efficiently and reliably.

The market for On-Board Magnetic Sensors has witnessed substantial growth due to the increasing demand for electric vehicles, the proliferation of IoT devices, industrial automation, aerospace and defense applications, healthcare equipment, and the expansion of renewable energy technologies. As industries continue to evolve and incorporate magnetic sensor technology into their products, this market remains dynamic and responsive to emerging trends and technological advancements.

## Key Market Drivers

### Automotive Electrification

The automotive industry is in the midst of a significant transformation, driven by the increasing demand for electric vehicles (EVs) and hybrid vehicles. On-board magnetic sensors play a pivotal role in these new-age automobiles, as they are essential for the operation of electric motors, battery management, and various safety systems. As the world shifts towards cleaner and more sustainable transportation, the On-board Magnetic Sensor market is expected to benefit significantly. These sensors are vital in monitoring the position, speed, and torque of motors, ensuring precise control and efficient energy consumption in electric and hybrid vehicles.

The growth of the On-board Magnetic Sensor market can be attributed to the expansion of the EV market, as well as the increasing adoption of advanced driver assistance systems (ADAS) in traditional vehicles. As automakers continue to invest in electrification and autonomous driving technologies, the demand for on-board magnetic sensors is projected to surge.

### Consumer Electronics and IoT

Consumer electronics and the Internet of Things (IoT) are playing a pivotal role in driving the demand for on-board magnetic sensors. These sensors are widely used in devices like smartphones, tablets, wearables, and smart home appliances. They provide essential functionality for features like screen orientation, navigation, and gaming. Furthermore, the proliferation of IoT devices in various industries, from healthcare to industrial automation, has created new applications for on-board magnetic sensors.

The growth of this market driver is closely tied to the expanding market for consumer electronics and the increasing integration of sensor technology in everyday devices. The ever-evolving IoT landscape, in particular, is expected to provide significant growth opportunities for the On-board Magnetic Sensor market.

### Industrial Automation

The global industrial automation sector has been experiencing robust growth, driven by the need for increased productivity, efficiency, and cost reduction. On-board magnetic sensors are a critical component in various automation applications, including robotics, material handling, and machine control. These sensors are used to measure positions, angles, and movements, enabling precise control of machinery and ensuring safety in industrial settings.

The adoption of Industry 4.0 principles, which emphasize the integration of smart technologies and data analytics in industrial processes, further fuels the demand for on-board magnetic sensors. As companies invest in automation to remain competitive and meet evolving market demands, the On-board Magnetic Sensor market is poised to grow substantially.

### Aerospace and Defense

The aerospace and defense industries rely on advanced sensor technologies to ensure the safety and efficiency of their systems. On-board magnetic sensors are used in various aerospace and defense applications, including navigation, missile guidance, and aircraft control. With the increasing defense budgets of many countries and the growing demand for commercial aircraft, the market for on-board magnetic sensors in these sectors is expected to expand.

The aerospace and defense driver for the On-board Magnetic Sensor market is underpinned by technological advancements, including the development of next-generation aircraft and the modernization of defense systems. As a result, the demand for high-precision, reliable magnetic sensors is on the rise, presenting substantial growth opportunities for manufacturers in this field.

### Healthcare and Medical Devices

The healthcare industry is witnessing a transformation driven by technological innovation. Magnetic sensors find applications in various medical devices such as MRI

machines, pacemakers, and infusion pumps. These sensors are crucial for monitoring and controlling medical equipment, ensuring patient safety and accurate diagnostics.

As the healthcare sector continues to invest in cutting-edge technologies and the demand for medical devices grows, the On-board Magnetic Sensor market is expected to benefit from these trends. The aging global population and increasing health consciousness are contributing to the expansion of this market driver.

## Renewable Energy

The renewable energy sector, encompassing wind and solar power, relies on advanced sensors for efficient energy production and distribution. On-board magnetic sensors are essential for monitoring the alignment and position of wind turbines, as well as for tracking solar panel orientation. As the world embraces cleaner energy sources, the demand for these sensors is likely to increase.

The growth of the renewable energy sector and the push for sustainable power solutions will continue to drive the On-board Magnetic Sensor market. Governments' initiatives to reduce carbon emissions and invest in renewable energy infrastructure further support the growth of this market driver.

In conclusion, the global On-board Magnetic Sensor market is influenced by a diverse set of drivers, including the transition to electric vehicles, the expansion of consumer electronics and IoT, industrial automation, aerospace and defense applications, healthcare, and the growth of renewable energy. The interplay of these drivers, alongside ongoing technological advancements, is expected to fuel the market's growth in the coming years, presenting opportunities for businesses operating in this sector.

## Government Policies are Likely to Propel the Market

### Environmental Regulations and Standards

Governments worldwide have been enacting stringent environmental regulations and standards aimed at reducing carbon emissions and promoting sustainable technologies. These regulations have a direct impact on the On-Board Magnetic Sensor market, especially in the context of electric vehicles (EVs) and renewable energy applications. Governments often incentivize the adoption of magnetic sensors in green technologies through subsidies, tax breaks, and emissions reduction targets.

For example, in the automotive sector, many countries have implemented emission standards and incentives to promote the use of electric and hybrid vehicles. On-board magnetic sensors are critical in the operation of electric motors in these vehicles, making them an integral component of meeting regulatory requirements.

### Trade and Export Regulations

Government policies related to trade and export can significantly affect the global On-Board Magnetic Sensor market. These policies include import tariffs, export restrictions, and trade agreements. Trade tensions between countries can lead to disruptions in the supply chain, affecting the cost and availability of magnetic sensors.

Additionally, export controls may be placed on certain sensor technologies for security reasons. Governments may restrict the export of sensitive sensor components to protect national interests. These policies can impact manufacturers, suppliers, and consumers in the On-Board Magnetic Sensor market, leading to shifts in global supply chains and pricing.

### Research and Development Funding

Many governments actively support research and development (R&D) in sensor technologies, including on-board magnetic sensors. R&D funding can come in the form of grants, subsidies, and tax incentives for companies engaged in sensor innovation.

These policies aim to stimulate technological advancements in the On-Board Magnetic Sensor market, leading to improved performance, reliability, and cost-effectiveness. Government support for R&D helps manufacturers stay competitive and ensures that the market remains innovative and responsive to evolving industry needs.

### Intellectual Property Protection

Intellectual property (IP) protection is crucial for companies in the On-Board Magnetic Sensor market. Governments play a significant role in regulating IP rights and enforcing patent laws. Strong IP protection encourages companies to invest in research and development, secure their innovations, and bring new sensor technologies to market.

Government policies in this area also relate to patent duration, trademark registration, and patent infringement penalties. These policies ensure that manufacturers can protect their investments in sensor technology, fostering innovation in the market.

## Safety and Quality Standards

Government policies set safety and quality standards for electronic components, including on-board magnetic sensors. These standards are critical to ensuring the reliability and safety of products that incorporate these sensors, particularly in sectors like automotive and aerospace.

Governments, through agencies such as the Federal Aviation Administration (FAA) in the United States or the European Union Aviation Safety Agency (EASA), establish and enforce standards that manufacturers must meet to ensure the safety and reliability of products. Compliance with these standards is often a prerequisite for market entry, and non-compliance can result in product recalls and legal repercussions.

## Industry-specific Incentives

Governments may offer industry-specific incentives to encourage the growth of markets that heavily rely on on-board magnetic sensors. For instance, in the automotive sector, various governments offer subsidies or tax incentives to manufacturers of electric vehicles and their components, including magnetic sensors. These incentives aim to accelerate the adoption of EVs and support the transition to cleaner transportation options.

Similarly, in the renewable energy sector, governments may provide grants and tax credits to companies that develop magnetic sensors for wind turbines or solar tracking systems, promoting the use of sustainable energy sources.

In conclusion, government policies have a substantial impact on the global On-Board Magnetic Sensor market. Policies related to environmental regulations, trade and export, R&D funding, intellectual property protection, safety and quality standards, and industry-specific incentives shape the market's growth, innovation, and competitiveness. Staying informed about these policies and adapting strategies accordingly is crucial for businesses operating in this dynamic and evolving market.

## Key Market Challenges

### Technological Advancements and Innovation

One of the primary challenges facing the global On-Board Magnetic Sensor market is

the need for continuous technological advancements and innovation. As the market grows and evolves, there is a constant demand for sensors with improved performance, precision, and reliability. Innovations are required to meet the increasingly complex requirements of applications across various industries, such as automotive, consumer electronics, and industrial automation.

One key aspect of this challenge is maintaining the pace of innovation to keep up with the rapid changes in technology. The digital transformation of industries, the growth of electric vehicles (EVs), the rise of the Internet of Things (IoT), and the development of advanced driver assistance systems (ADAS) all demand magnetic sensors with enhanced capabilities. Manufacturers must invest in research and development to meet these requirements.

Innovation in the On-Board Magnetic Sensor market involves improving sensitivity, reducing noise, enhancing resistance to environmental factors, and ensuring compatibility with emerging technologies. This requires substantial financial and intellectual investments, and it can be challenging for smaller companies to compete with larger, more resourceful players.

Furthermore, innovation must also address cost-effectiveness. While improving sensor technology is essential, it's equally important to keep production costs reasonable to maintain competitiveness in the market. This balance between innovation and cost control is a delicate challenge for manufacturers.

Another aspect of the technological challenge is staying ahead of potential disruptions. Emerging technologies like quantum sensors and alternative sensor technologies (e.g., optical sensors) could disrupt the magnetic sensor market. Staying informed about these developments and adapting strategies accordingly is vital to remaining competitive in the sensor industry.

### Supply Chain Vulnerabilities

The On-Board Magnetic Sensor market is highly dependent on complex global supply chains for raw materials, components, and manufacturing. This interdependence exposes the market to various supply chain vulnerabilities, which have become even more pronounced in light of recent global events, such as the COVID-19 pandemic and geopolitical tensions.

Supply chain vulnerabilities manifest in several ways. First, the supply of critical

materials, such as rare-earth metals (neodymium, samarium, etc.), used in the production of magnetic sensors can be disrupted due to factors like geopolitical tensions, trade restrictions, or fluctuations in global markets. Such disruptions can lead to shortages and price volatility, affecting the production and pricing of magnetic sensors.

Second, the supply chain may be affected by transportation challenges, such as port closures, labor strikes, or transportation delays. Events like these can disrupt the timely delivery of raw materials and components, leading to production delays and increased costs.

Third, the pandemic has highlighted the need to diversify supply chain sources to mitigate risk. Over-reliance on a single source or region can leave manufacturers vulnerable to disruptions, as witnessed with the sudden interruption in the supply of essential components during the COVID-19 crisis.

Additionally, intellectual property (IP) theft and counterfeiting are growing concerns in the supply chain, particularly in the electronics industry. Manufacturers must contend with the challenges of protecting their IP and ensuring that counterfeit components do not enter their production processes.

Mitigating these supply chain vulnerabilities requires proactive risk management and diversification of supply sources. Manufacturers may need to assess their supply chains, invest in backup suppliers, and explore local sourcing options to enhance resilience. Furthermore, collaboration and transparency within the supply chain are essential for addressing these challenges effectively.

In conclusion, the On-Board Magnetic Sensor market faces substantial challenges in the form of technological advancements and innovation, as well as supply chain vulnerabilities. Navigating these challenges requires a combination of research and development, cost control, supply chain management, and adaptability to emerging technologies and global market dynamics. Manufacturers in the sensor industry must be agile and proactive in addressing these challenges to sustain growth and competitiveness.

## Segmental Insights

### Hall Effect Sensors Insights



The Hall Effect Sensors segment held the largest Market share in 2022. Hall Effect Sensors are known for their simplicity, which translates into robust and reliable performance. They are relatively easy to manufacture and integrate into various applications. This simplicity reduces the likelihood of sensor failures and ensures consistent performance, making them a preferred choice for manufacturers. Hall Effect Sensors are cost-effective, which is crucial in large-scale applications. Their affordability makes them an attractive choice for manufacturers looking to keep production costs in check while still benefiting from magnetic sensing capabilities. These sensors can be used in a wide range of applications. Hall Effect Sensors are versatile and capable of detecting both linear and rotational motion. They are widely used for position sensing, speed measurement, and current sensing in automotive, industrial, and consumer electronics applications. Hall Effect Sensors operate in a contactless manner, which means they don't have physical components that wear out over time. This characteristic enhances their durability and longevity, particularly in applications where components are subjected to significant wear and tear. Hall Effect Sensors are known for their high sensitivity to magnetic fields. They can accurately detect even weak magnetic fields, making them suitable for a wide array of applications where precise measurements are required. Manufacturers can customize Hall Effect Sensors to meet specific application requirements. This adaptability is vital, as different industries and applications may have unique needs, and Hall Effect Sensors can be tailored to address them effectively. Many Hall Effect Sensors operate on low power, making them suitable for battery-powered and energy-efficient devices, such as portable consumer electronics and battery-operated sensors. Hall Effect Sensors have a long history of successful use in various industries, and they benefit from a well-established ecosystem of manufacturers, suppliers, and end-users. This familiarity and the availability of expertise contribute to their continued dominance in the market. The field of Hall Effect sensing continues to evolve, with ongoing research and development aimed at enhancing sensitivity, reducing power consumption, and expanding their application range. This ensures that Hall Effect Sensors remain competitive and adaptable to emerging market demands.

### Position Sensing Insights

The Position Sensing segment held the largest Market share in 2022. Position sensing has a wide range of applications across various industries. On-Board Magnetic Sensors are used in applications such as automotive throttle position sensing, gear position sensing, steering angle sensing, and industrial automation for monitoring the positions of robotic arms and conveyors. This versatility makes position sensing a cornerstone of the magnetic sensor market. The automotive sector is a significant driver of position

sensing applications. In modern vehicles, On-Board Magnetic Sensors are critical for various functions, including detecting the position of the accelerator pedal, gear shifter, and steering wheel. With the increasing demand for electric vehicles (EVs) and advanced driver assistance systems (ADAS), the automotive industry's reliance on position sensing is expected to continue growing. Position sensing is integral to consumer electronics, where it enables features like screen rotation, gesture recognition, and location-based services. Smartphones, tablets, and wearable devices use On-Board Magnetic Sensors to detect the device's orientation and movement, enhancing user experiences. In the industrial automation sector, position sensing is vital for monitoring the positions of moving parts and machinery. Magnetic sensors are used in robotic arms, conveyor systems, and automated manufacturing processes to ensure precise control and optimize operational efficiency. The aerospace and defense industries rely on position sensing for various applications, including missile guidance, aircraft control, and navigation. On-Board Magnetic Sensors play a crucial role in determining the precise positioning and orientation of aerospace and defense systems. Magnetic sensors offer high accuracy and reliability in position sensing applications. They provide precise measurements, ensuring that the monitored positions are reported accurately. This is essential in safety-critical applications, such as automotive and aerospace. The field of position sensing with magnetic sensors has seen ongoing innovation. Sensor manufacturers have worked to enhance the sensitivity, resolution, and reliability of these sensors, making them even more suitable for demanding applications. These advancements have further solidified position sensing's dominance in the market.

## Regional Insights

Asia Pacific was the largest market for on-board magnetic sensors, accounting for over 40% of the global market share in 2022. The growth of the market in this region is attributed to the increasing demand for electronic devices in emerging countries such as China, India, and South Korea. Additionally, the growing adoption of advanced technologies such as electric vehicles and autonomous vehicles in the region is further fueling the market growth.

North America was the second-largest market for on-board magnetic sensors, accounting for over 30% of the global market share in 2022. The growth of the market in this region is driven by the increasing demand for consumer electronics and automotive applications. Additionally, the growing adoption of advanced technologies such as the Internet of Things (IoT) in the region is further fueling the market growth.

Europe was the third-largest market for on-board magnetic sensors, accounting for over 20% of the global market share in 2022. The growth of the market in this region is driven by the increasing demand for consumer electronics and automotive applications. Additionally, the growing adoption of advanced technologies such as robotics and automation in the region is further fueling the market growth.

### Key Market Players

Infineon Technologies AG

TDK Corporation

Allegro MicroSystems, Inc.

Melexis NV

STMicroelectronics N.V.

NXP Semiconductors N.V.

Robert Bosch GmbH

Asahi Kasei Microdevices Corporation

Murata Manufacturing Co., Ltd.

ROHM Semiconductor Co., Ltd.

### Report Scope:

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

On Board Magnetic Sensor Market, By Type:

Hall Effect Sensors

Magneto-resistive Sensors

SQUID Sensors

Others

On Board Magnetic Sensor Market, By Magnetic Density:

Less than 1microgauss

1microgauss-10gauss

Above 10gauss

On Board Magnetic Sensor Market, By Industry Vertical:

Consumer Electronics

Automotive

Industrial

Aerospace and Defense

Healthcare

Others

On Board Magnetic Sensor Market, By Application:

Speed Sensing

Detection

Position Sensing

Navigation

Electric Compass

## On Board Magnetic Sensor Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

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 present in the Global On Board Magnetic Sensor Market.

### Available Customizations:

Global On Board Magnetic Sensor 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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