ADAS Market by System (ACC, DMS, IPA, PDS< TJA, FCW,, RSR, LDW, AEB, BSD), Component (Camera, LiDAR, Ultrasonic, Radar), Vehicle Type, EV Type, Vehicle Class, Level of Autonomy, Offering, Sales Channel and Region - Global Forecast to 2030

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Report description:

The global ADAS market size is projected to grow from USD 27.2 billion in 2021 to USD 74.9 billion by 2030, at a CAGR of 11.9%. Safety features are an important prerequisite for automotive customers across the world. Governments across the world have mandated the incorporation of features such as lane departure warning (LDW) and automatic emergency braking (AEB). Different types of safety features have, therefore, been developed to assist drivers and lower the number of accidents.

"Growing demand for safety and driving assistance systems likely to drive the growth of the ADAS market during the forecast period"

The automotive industry is witnessing a rapid evolution of safety features, which is expected to increase exponentially in the coming years to provide a safer and more convenient driving experience. Major OEMs such as Toyota and Honda are launching vehicles with features such as blind spot detection, rear cross traffic, lane keep assist, forward collision warning, and automatic emergency braking as a standard. OEMs such as Cadillac, Tesla, Nissan, Honda and Audi are currently developing L3 driving systems for their upcoming models. The increasing demand for sophisticated cruise control and driving comfort features has also fueled the safety systems market. Transforming a vehicle into a self-driving one could help reduce errors caused by drivers. As per the NHTSA, the total number of fatalities due to road accidents in the US was 38,680 36,560 in 202018. ADAS could play a crucial role in reducing this number and lead to a safe, productive, and efficient driving experience. Active safety systems such as blind spot detection (BSD), automatic emergency braking (AEB), and lane departure warning (LDW) play a major role in automated driving technology today.

Demand for luxury vehicles will further strengthen the demand for ADAS during the forecast period. Several economies around the world have recovered from the 2008 recession. Higher growth rates have been observed in developing countries such as China and India, among others. The standard of living has also improved in developing countries, along with a considerable rise in

spending power. German auto brands such as Mercedes-Benz, BMW, and Audi dominate the global luxury car market. The change in consumer preferences has increased the demand for better products, which has positively affected the sales of premium cars across the globe. For instance, major BMW's automotive division recorded growth in 2019, despite the slowdown in the global automotive market. The division registered a growth of 6.8% in 2019 due to increasing deliveries in the luxury cars segment. Its subsidiary, Rolls Royce, sold 5,100 units, an increase of 21.6%, compared to 4,194 units, a year earlier, while the production volume increased by 25.3%. Similarly, the group sold more BMW branded vehicles in 2019 than in 2018. Safety innovations are first introduced in the luxury and premium car segments, and this rise in sales will act as a driver for the ADAS market.

"North America is projected to play a major role in the ADAS market during the forecast period."
The North American region has been studied for the US, Canada, and Mexico. The ADAS market in the region is projected to witness significant growth during the forecast period due to the higher penetration of ADAS features in most vehicles here. North American OEMs such as Ford Motors Co., General Motors Co., and Fiat-Chrysler Automotive, along with established European and Asian OEMs such as Toyota (Japan), Nissan (Japan), Honda (Japan), Hyundai/Kia (South Korea), BMW (Germany), and Volkswagen (Germany) offer ADAS features in vehicles. The automotive industry, largely dominated by the US, is one of the most advanced. The US is considered one of the most lucrative markets for ADAS, as it has always been an innovation hub for global automakers. The country houses domestic OEMs such as General Motors and Ford as well as foreign automakers such as FCA Group, Volkswagen, Toyota, and Nissan. These OEMs invest heavily in megatrends, such as connected mobility and autonomous vehicles. Major automakers in the US offer ADAS as standard in most vehicles. According to the NHTSA, 12 OEMs already mandated AEB in 75% of their new passenger car vehicles for the period September 1, 2018, through August 31, 2019. Just 2 years ago, penetration was only 30%. More active initiatives by OEMs would further increase the demand for AEB systems in the country.
The COVID-19 crisis has resulted in manufacturing and supply disruptions in North America, due to which, the automobile industry in the region has experienced a decline in demand with an uncertain recovery timeline. Additionally, OEMs have stopped production across North America, which has resulted in a decline in production as well as sales. Automotive-related high-tech tests that companies were carrying out in the region have also been suspended. For instance, self-driving technology companies, including Waymo, Cruise, and Uber, have suspended autonomous car testing that involves backup drivers. Pony.ai has paused its testing of Robo Taxi in California. This might not change the direction of the automobile industry in the region toward the adoption of autonomous driving, connected services, electric driving, and shared mobility, but the adoption rate might slow down. OEMs are likely to slow down their investment in R&D in the forthcoming quarters of 2020 to maintain revenue flow; this will also affect the intervention of new technologies in the region.
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 Company Type: OEMs - 30%, Tier 1 - 51%, and Tier 2 - 19%,
- By Designation: CXOs - 31%, Directors - 41%, and Others* - 28%
- By Region: North America - 33%, Europe - 38%, Asia Pacific - 24%, and Rest of the World- 5%
*Others include sales, marketing, and product managers.

The ADAS market comprises major manufacturers such as Robert Bosch (Germany), Continental AG (Germany), ZF Friedrichshafen (Germany), Denso (Japan), Aptiv (UK), Valeo (France), and Magna International (Canada).
Research Coverage:
The study covers the ADAS market across various segments. It aims at estimating the market size and future growth potential of this market across different segments such as system, component, offering, electric vehicle, level of autonomy, vehicle type, and region. The study also includes an in-depth competitive analysis of key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

Key Benefits of Buying the Report:
The report will help leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall ADAS market. 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 also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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ADAS Market by System (ACC, DMS, IPA, PDS< TJA, FCW,, RSR, LDW, AEB, BSD), Component (Camera, LiDAR, Ultrasonic, Radar), Vehicle Type, EV Type, Vehicle Class, Level of Autonomy, Offering, Sales Channel and Region - Global Forecast to 2030

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