Automotive ADAS Sensor Market - Global Outlook & Forecast 2024-2029

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Report description:

The global automotive ADAS sensors market was valued at USD 17.50 billion in 2023 and is expected to grow at a CAGR of 14.06% from 2023-2029.

MARKET TRENDS & OPPORTUNITIES

High Demand for Safety Features

The automotive industry is witnessing a transformative trend marked by an unprecedented demand for safety features within Advanced Driver Assistance Systems (ADAS) sensors. As the importance of road safety continues to gain prominence, a growing emphasis is being placed on equipping vehicles with advanced technologies that enhance driver and passenger safety. This trend is characterized by a surge in integrating ADAS sensors, such as radar, lidar, cameras, and ultrasonic sensors, into modern vehicles to facilitate real-time data collection and the execution of safety-related functions. In this era of heightened awareness regarding safety, ADAS sensors are at the forefront of innovation, aiming to reduce accidents and improve road safety. This trend is reshaping the automotive landscape and offering significant opportunities for sensor manufacturers to meet the burgeoning demand for safety features. It is a cornerstone of development and investment within the automotive sector.

Rising Demand for Luxury Vehicles

The automotive industry is undergoing a transformative shift, with the integration of Advanced Driver Assistance Systems (ADAS) sensors playing a pivotal role in shaping the future of vehicle safety and driving experience. One significant driver fueling this evolution is the escalating demand for luxury vehicles with cutting-edge ADAS technologies. This global demand manifests uniquely in various countries, reflecting diverse consumer preferences, regulatory landscapes, and economic conditions. Luxury vehicles, characterized by their premium features, performance, and brand prestige, are increasingly becoming showcases for advanced safety and convenience technologies. The incorporation of ADAS sensors, including radar, LiDAR, cameras, and ultrasonic sensors, is at the forefront of this transformation. Luxury car buyers often seek cutting-edge technologies, and

automakers strive to differentiate their premium models by incorporating advanced sensor-based systems and supporting the growth of the automotive ADAS sensors market.

INDUSTRY RESTRAINTS

High Cost of Sensors

The high cost of sensors in the global automotive ADAS sensors market can be a significant restraint. ADAS relies heavily on radar, lidar, cameras, ultrasonic sensors, and others to gather data about the vehicle's surroundings and make informed decisions to enhance safety and driving experience. ADAS sensors often incorporate advanced technologies to provide accurate and real-time data. For example, lidar sensors use laser beams to measure distances, and advanced cameras may have high-resolution imaging capabilities. The complexity of these technologies can drive up production costs. Developing and improving sensor technologies require significant investment in research and development. Designing, testing, and refining these sensors contribute to their overall expense.

SEGMENTATION INSIGHTS

INSIGHTS BY PRODUCT

The global automotive ADAS sensors market by product is segmented into radar, camera, lidar, ultrasonic, and others. The radar sensor market holds the most prominent segmental share in 2023. Radar sensors use radio waves to detect objects around the vehicle, helping to monitor the environment and provide valuable information for various safety features. Further, several factors contribute to the growing demand for radar sensors in the market. These factors highlight the importance of radar technology in enhancing vehicle safety and enabling various advanced features. Increasing focus on worldwide vehicle safety regulations and standards is a significant driver for adopting ADAS technologies, including radar sensors. Governments and safety organizations are pushing for integrating advanced safety features in vehicles to reduce accidents and improve road safety.

Segmentation by Product
- Radar Sensor
- Camera Sensor
- LiDAR Sensor
- Ultrasonic Sensor
- Others

INSIGHT BY APPLICATION

The Adaptive Cruise Control (ACC) application segment will dominate the global automotive ADAS sensors market in 2023. ACC is a feature in ADAS that enhances traditional cruise control by automatically adjusting a vehicle's speed to maintain a safe following distance from the vehicle ahead. Several factors contribute to the growing demand for ACC in the global automotive ADAS sensors market, including a high focus on road safety. ACC helps maintain a safe following distance, reducing the risk of rear-end collisions. As safety becomes a more significant concern for both consumers and regulatory bodies, the adoption of ACC as a safety feature is on the rise. ACC can enhance the driving experience in heavily congested traffic by automatically adjusting the vehicle's speed according to traffic flow; this reduces driver stress and contributes to more efficient traffic flow.

Segmentation by Application
- Adaptive Cruise Control
- Automatic/Intelligent Emergency Braking

-Lane Departure Warning System
-Blind Spot Detection System
-Others

INSIGHT BY VEHICLE TYPE

The global automotive ADAS sensors market by vehicle type is segmented into passenger, light, and heavy commercial vehicles. In 2023, the market has been dominated by the passenger vehicle segment. This is significantly due to new and advanced features in modern vehicles and the growing electric vehicle industry across the automotive ADAS sensor market. Moreover, with rising demand for infotainment & telematics services, passenger vehicles are becoming more connected, with features like in-car infotainment systems, navigation, vehicle-to-vehicle (V2V) communication, and smartphone integration, all of which rely on semiconductor components. Furthermore, heavy commercial vehicles include trucks, buses, and other large vehicles for transporting goods and passengers long distances. Improved economic development and industrialization mainly drive the demand for goods transportation, leading to increased demand for heavy commercial vehicles and related sensor technologies.

Segmentation by Vehicle Type
-Passenger Vehicles
-Light Commercial Vehicle
-Heavy Commercial Vehicle

GEOGRAPHICAL ANALYSIS

APAC holds the largest global automotive ADAS sensors market share, accounting for over 38% in 2023. As one of the fastest-growing automotive markets in the world, APAC is characterized by its diverse range of countries, from established automotive powerhouses like Japan and South Korea to emerging economies such as China and India. Furthermore, with key automotive giants like Japan, South Korea, and China, the region produces a significant portion of the world's vehicles. The integration of automotive ADAS sensors has been pivotal in enhancing these vehicles' performance, safety, and features. Connected vehicles and advanced infotainment systems are sought after by consumers in the APAC region. Moreover, the improving economic conditions of Asian countries (including China, India, and South Korea) position the region as the most attractive global automotive ADAS sensors market.

Segmentation by Geography

-APAC
oChina
oJapan
oSouth Korea
oAustralia
oSingapore
oIndonesia
oThailand
oIndia
-North America
oThe U.S.
oCanada
-Europe
oGermany

o The U.K.
o France
o Italy
o Spain
o Russia
o Poland
- Middle East & Africa
o Saudi Arabia
o UAE
o South Africa
o Turkey
- Latin America
o Brazil
o Mexico
o Argentina
o Rest of Latin America

COMPETITIVE LANDSCAPE

The global automotive ADAS sensors market is characterized by a high degree of fragmentation, featuring numerous local and international players. This fragmentation results from the presence of both local and global market participants. Key players in the global automotive ADAS sensors market include Robert Bosch, Continental, Infineon Technologies, NXP Semiconductors, DENSO Corporation, Renesas Electronic Corporation, and others. Competition among these entities is fierce, driven by the rapidly evolving technological landscape that demands vendors to innovate and upgrade continually within the automotive industry. Given this dynamic environment, vendors are compelled to refine their unique value propositions to establish a robust presence in the market. Furthermore, vendors compete based on features, offerings, variety, and pricing. Vendors use new business models and focus on developing the portfolio of their establishments to drive growth. The focus has shifted toward using high-quality raw materials and efficient semiconductor sources.

Key Company Profiles

- Continental
- DENSO CORPORATION
- Infineon Technologies
- NXP Semiconductors
- Renesas Electronics Corporation
- Robert Bosch

Other Prominent Vendors

- Allegro MicroSystems
- Amphenol
- Analog Devices
- Aptiv
- Autoliv
- CTS
- Elmos Semiconductor

-Intel Corporation
-Magna International
-Melexis
-Micron Technology
-ON Semiconductor Corporation
-Quanergy Solutions
-ROHM
-Samsung Electronics
-Sensata Technologies
-SK Hynix
-STMicroelectronics
-TE Connectivity
-Texas Instruments
-Toshiba Electronic Devices & Storage
-Valeo
-ZF Friedrichshafen

KEY QUESTIONS ANSWERED:

1.How big is the automotive ADAS sensors market?
2.What is the growth rate of the global automotive ADAS sensors market?
3.Which region dominates the global automotive ADAS sensors market share?
4.What are the significant trends in the automotive ADAS sensors market?
5.Who are the key players in the global automotive ADAS sensors market?

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