

Europe LiDAR - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe LiDAR Market is expected to register a CAGR of 23.6% during the forecast period.

Key Highlights

- LiDAR-based mapping solutions are agile and can be used on a stationary or moving vehicle. Due to this, they are being adopted by many industries, especially for application in engineering, construction, environment, and exploration, proving the effectiveness and demand for this technology. The technology was invented for military use but was first adopted widely by meteorologists to study clouds in the early 2010s.
- Governments across the continent are investing in aerial LiDAR development technologies aggressively. The UK government has been collecting LiDAR data for the past 17 years and has made it available to the public. A spokesperson for the government claimed that the data may be beneficial for archeologists to visualize ancient landscapes.
- Further, the French government is supporting the development of self-driving cars, aiming to deploy 'highly automated' vehicles on public roads between 2020 and 2022. The government had aimed to establish a legislative regulation that is likely to allow the use of autonomous public transport and the circulation of third-level autonomous cars.
- However, the market is challenged by a relatively high cost of equipment and surveying applications, along with a lack of education and awareness about the technology, which impedes the market's growth. However, increasing innovation by the studied vendors is expected to bring down the prices and further expand the commercial scope of the technology.
- The COVID-19 outbreak has affected industries across the globe. The automotive industry is one of the significant adopters of LiDAR. The outbreak has led to the shutdown of various production plants. According to the European Automobile Manufacturers Association (ACEA), the region-wide production losses in the automotive industry due to factory shutdowns amounted to at least 2,446,344 motor vehicles, including passenger cars, trucks, vans, buses, and coaches.

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Europe LiDAR Market Trends

Engineering? Industry to Hold Considerable Market Share

- Surveying and civil engineering find crucial importance in the LiDAR technology for the aerial and terrestrial scanning to provide valuable insights as to the existing architecture or details regarding the stability of the inclinations and other factors, which could play a vital role in the development of the plans for construction and other operations.
- UAVs (unmanned aerial vehicles) are also being used for surveying applications as they eliminate the challenges faced by technicians who use fixed solutions in hazardous areas. Also, considering cost reduction advantages compared to helicopters with LiDAR technologies, UAVs integrated with LiDAR are expected to gain traction.
- The remote operation of the ground-based LiDARs has further ensured a safe investigation of the locations by the authorities for monitoring the rock mechanics for the rock mass characterization and slope stability. Geomechanical details hold critical importance in establishing safe locations for laying the roadways and other modes of ground transport.
- LiDAR is widely used in the railroad industry to monitor the asset health reports for efficient asset management and the responsible government authorities to assess the pathway conditions due to increasing passenger traffic. LiDAR is frequently used to understand the riverbed's depth and flow strength to create appropriate designs for dams and other flow control constructions. They also play a vital role in designing stormwater or flood management systems as they help analyze the possible complications resulting from an environmental disaster.
- The LiDAR products and technology usage in construction and restoration applications are expected to increase during the forecast period as awareness about their safe and easy operation spread through the regions. In addition, using aerial LiDAR for construction applications is also preferred over other methods, like photogrammetry (data collected from high-resolution cameras to create either a 2D or 3D survey of an area), considering the technical limitations, i.e., the technology cannot be used to get past brush or ground cover.
- Moreover, the growing number of constructions in this region drives the growth of the LiDAR market. For instance, according to OECD (Organisation for Economic Co-operation and Development) and Eurostat, the revenues generated from the European construction/engineering industry are predicted to increase by EUR 2,132.8 billion in 2024 from EUR 2,026.2 billion in 2021, which is expected to drive the growth of the LiDAR market in Europe.

Increasing Adoption of LiDAR in the Automotive Industry? to Drive the Market Growth

- The growing trends in the automotive industry toward self-driving cars and electric vehicles are expected to be the critical drivers for newer applications of LiDAR. Self-driving cars increasingly use LiDAR sensors for generating huge 3D maps for 360 vision and for accurate information to assist in self-navigation and object detection.
- With the growing consumer propensity toward electric vehicles, preference for ADAS, and the growing adoption of autonomous technology in the industry, the LiDAR market is expected to attract significant investments in the region. For instance, Ouster, a provider of LiDAR sensors for autonomous vehicles, mapping, and robotics, announced its expansion into Europe with a new office in Paris.
- To meet the growing demand for LiDAR sensors, various automobile OEMs have started working on new electric cars and presenting them at auto expos. Additionally, these OEMs have started setting up multiple factories across the region to gain a competitive advantage in terms of first-mover advantage in the marketplace.
- Moreover, self-driving and autonomous cars are becoming a reality soon, with major giants, such as Google, Tesla, and BMW, already releasing their prototype models. The Canadian car components supplier, Magna, and an Israeli LiDAR technology developer, Innoviz Cooperated, will provide BMW with its innovative sensor and system. It is expected to offer high-resolution

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LiDAR technology, which generates a 3D point cloud in real-time of the vehicle's surroundings under all weather conditions.

- With the recent technological advancements in reducing both size and cost of the sensor, LiDAR sensors are expected to be used in autonomous vehicle technology. They have become commonplace in mass-market vehicles such as cameras, radars, and other low-cost safety technology.
- For instance, Velodyne Lidar Inc., a supplier of sensing systems for the autonomous vehicle (AV) industry, launched a new LiDAR unit which costs USD 100 and comes in a compact size smaller than a deck of cards to be embedded in a range of various solutions in the industry.
- According to ACEA, With the increasing sales of passenger cars in key European markets in 2021, the sales in Germany were 26,22,132 million, followed by France in the European region. These sales numbers will also continue to rise in the future, which is expected to drive the growth of the LiDAR market.

Europe LiDAR Industry Overview

The European LiDAR market is competitive owing to the presence of various players in the market. Players focus on strategic activities such as new product launches, partnerships, mergers, and acquisitions to capture the highest market share. Some of the key developments in the market are:

- November 2021 - Velodyne Lidar announced a multi-year agreement to provide its Lidar sensors to Topodrone, a Swiss-based company that develops affordable, high-precision solutions for aerial surveys. The sensors will enable Topodrone to bring high-precision mapping and 3D modeling to demanding environments, including farms, forests, infrastructure, and more, to support development that advances economic and sustainability goals.
- September 2021 - YellowScan, a France-based UAV LiDAR solutions designer, announced the launch of YellowScan Explorer. The new lidar mapping system is designed to be used on light human-crewed aircraft or UAV (unmanned aerial vehicles) platforms. It allowed end-users to tackle a broad range of projects.
- July 2021 - XenomatiX, a pioneer of true-solid-state LiDARs for ADAS, autonomous vehicles, and other road applications, including construction and maintenance, launched the next generation of Xenolidar-X. The new Xenolidar-X had been designed to meet the performance requirements needed by modern OEMs.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

4.1 Market Overview

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4.2 Industry Attractiveness - Porter's Five Forces Analysis

4.2.1 Bargaining Power of Suppliers

4.2.2 Bargaining Power of Buyers

4.2.3 Threat of New Entrants

4.2.4 Intensity of Competitive Rivalry

4.2.5 Threat of Substitute Products

4.3 Industry Value Chain Analysis

4.4 Assessment of COVID-19 Impact on the Market

5 MARKET DYNAMICS

5.1 Market Drivers

5.1.1 Fast Paced Developments and Increasing Applications of Drones

5.1.2 Increasing Adoption in the Automotive Industry

5.2 Market Challenges

5.2.1 High Cost of the LiDAR Systems

6 MARKET SEGMENTATION

6.1 By Product

6.1.1 Aerial LiDAR

6.1.2 Ground-based LiDAR

6.2 By Component

6.2.1 GPS

6.2.2 Laser Scanners

6.2.3 Inertial Measurement Unit

6.2.4 Other Components

6.3 By End-user Industry

6.3.1 Engineering

6.3.2 Automotive

6.3.3 Industrial

6.3.4 Aerospace and Defense

6.4 By Country

6.4.1 United Kingdom

6.4.2 Germany

6.4.3 Spain

6.4.4 Netherlands

6.4.5 France

6.4.6 Belgium

6.4.7 Rest of Europe

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Leica Geosystems Ag

7.1.2 Topcon Corporation

7.1.3 RiegI Laser Measurement Systems GmbH

7.1.4 Velodyne Lidar Inc.

7.1.5 Quanergy Systems Inc.

7.1.6 Phantom Intelligence Inc.

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- 7.1.7 Neptec Technologies Corp.
- 7.1.8 Innoviz Technologies Ltd
- 7.1.9 Geoslam
- 7.1.10 Sick Ag
- 7.1.11 Trimble Inc.
- 7.1.12 TELEDYNE Optech
- 7.1.13 Denso Corporation
- 7.1.14 Faro Technologies Inc.

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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