Global and China Advanced Driver Assistance System (ADAS) Industry Report, 2014-2015

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

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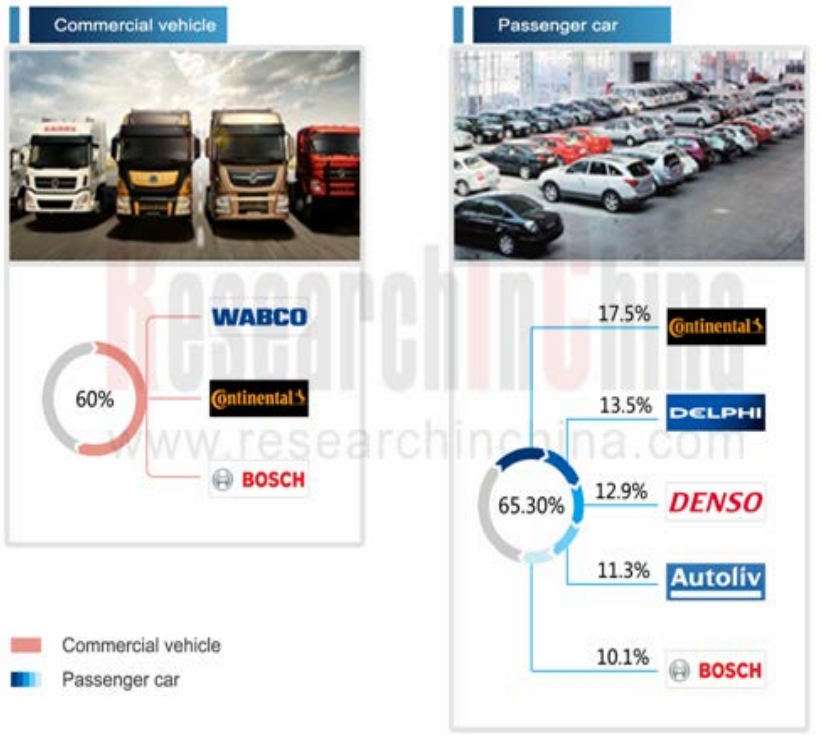
Abstract

Global and China Advanced Driver Assistance System (ADAS) Industry Report, 2014-2015 focuses on the following:

- Overview of automotive ADAS system, including classification of ADAS system, laws, regulations and rating requirements in major countries, consumer cognition, functions and technical solutions of main ADAS systems;
- Global ADAS industry chain, covering market size, technical features and companies of sensor, chip and system integration;
- Application status and competitive landscape of ADAS in the world and China, embracing installation rate and market size of ADAS systems in China and beyond, and market share of global major system integrators;
- Global major suppliers of ADAS chips/solutions and system integration enterprises, covering operation and financials, ADAS technologies and relevant businesses.

Advanced Driver Assist System (ADAS) is the basis for intelligent driving and automated driving, and is also the specific application of active safety technology. ADAS can be generally divided into two categories: safety assistance and convenience/comfort assistance, with some systems integrating the pair of them.

Global Major ADAS System Integrators and Their Market Share,2013



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The application of ADAS system can significantly reduce the number of traffic accidents and the severity of injuries. At present, the greatest motivation to develop and adopt ADAS comes from more stringent requirements on safe driving from governments. Developed countries, such as the ones in Europe, USA and Japan lay down stipulations on ADAS configuration in new vehicles with respect to legislation and rating requirements (NCAP), generally requiring ADAS to have functions of forward collision avoidance (FCA) and lane departure warning (LDW). The forerunner EU also puts forward requirements on automatic emergency braking (AEB), lane keeping assist (LKA) and even pedestrian detection.

ADAS has been among the fastest growing field in automotive market and is expected to register a CAGR of 34% during 2013-2017. Currently, developed countries in Europe and America have had nearly 8% of new vehicles equipped with ADAS, compared to merely about 2% in emerging markets. It is predicted that 50% of new vehicles will carry ADAS by 2022 globally.

ADAS consists mainly of sensors, chips (with signal processing and data computing chips as its core), algorithm software, etc. Sensors are usually developed and supplied by system integrators; chips and algorithm software are generally co-developed by semiconductor companies and system integrators, as well as complete vehicle makers when it comes to application in specific models. System integrators not only have the most direct and close relationship with complete vehicle makers, but also are the suppliers of integrated ADAS system solutions.

In passenger vehicle field, ADAS system integrators are large in number, mostly being large auto parts companies. At present, the leading companies are technologically developing toward combination and integration of active safety with passive safety and integration of multiple ADAS systems. These integrations, while improving intelligentification and safety, can reduce space used and costs. By region, Continental AG, Delphi and Denso Corporation are system integrators holding the highest market share in Europe, America and Asia, respectively. Globally, Continental AG boasts the largest market share, as well as No. 1 as concerns researchers and capital investment in ADAS and automated driving technology. World’s top 5 system integrators make up more than 65% of market share, with the remaining occupied by Valeo, TRW, Magna, Hella, Panasonic, Gentex, etc.

Compared with passenger vehicles, the system integrators that supplying ADAS for commercial vehicles are highly concentrated, with WABCO, Continental AG and Bosch making up 60% global market share.

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