

**Global and China Advanced Driver
Assistance System (ADAS) Industry
Report, 2015-2019**

Jul. 2015

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.

Abstract

ADAS, short for Advanced Driver Assistance System, is not only the basis of intelligent driving and automatic driving, but the concrete application of active safety technology. ADAS can be generally divided into two categories: safety assistance and convenience and comfort assistance, with some systems integrating the pair of them.

The application of ADAS can significantly reduce the number of traffic accidents and the severity of injuries. At present, the greatest motivation to develop and use ADAS comes from more stringent requirements on safe driving from governments. Europe, the United States, Japan, and other developed countries have made provisions on ADAS configuration in new vehicles with respect to legislation and rating standard (NCAP), generally requiring ADAS to have functions of forward collision avoidance (FCA) and lane departure warning (LDW). The forerunner EU also put forward requirements on automatic emergency braking (AEB), lane keeping assistance (LKA) and even pedestrian detection system (PDS).

ADAS has been one of the fastest-growing sectors in automotive field and is expected to register a CAGR of 32% during 2014-2019. Currently, developed countries in Europe and America have had nearly 8% of new vehicles equipped with ADAS, in contrast to about 2% in emerging markets. It is predicted that over 25% of new vehicles will carry ADAS by 2019 globally.

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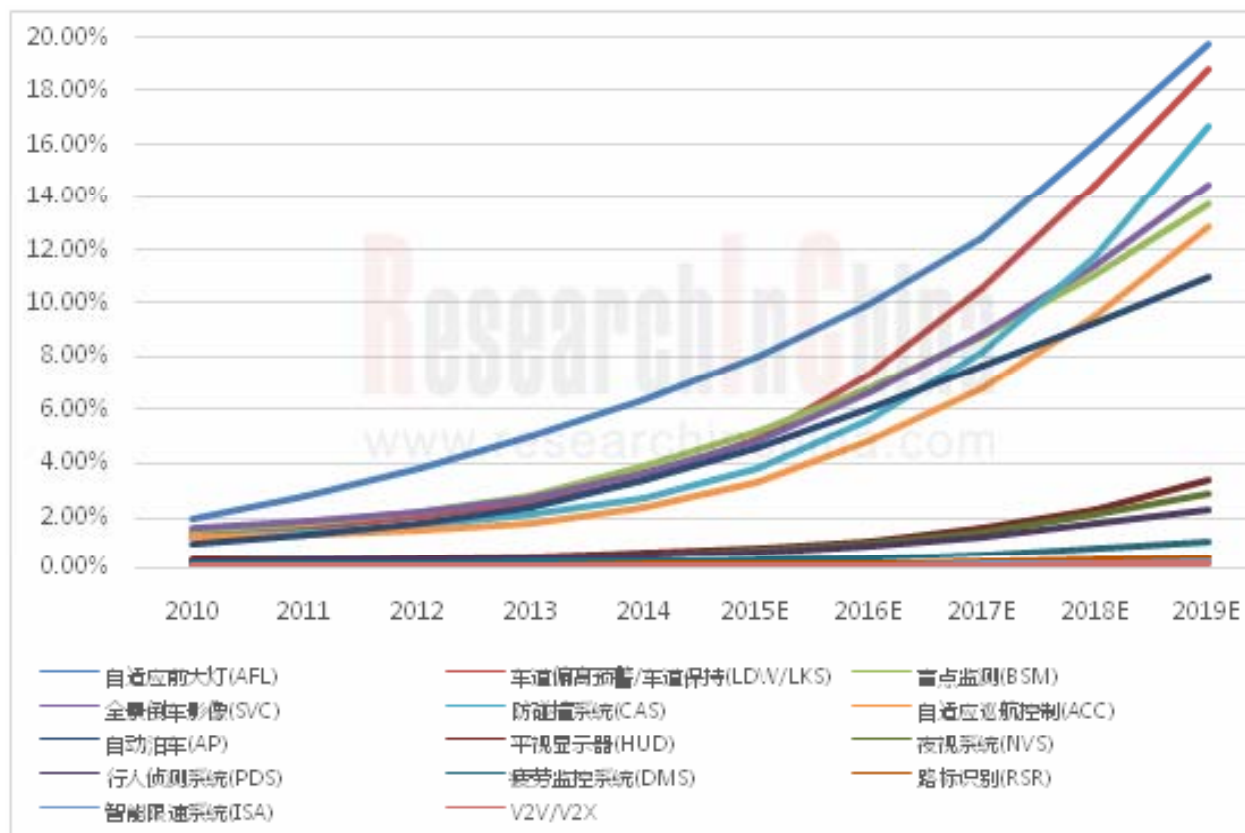
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Compared with passenger vehicles, the system integrators that are supplying ADAS for commercial vehicles are highly concentrated, with WABCO, Continental AG and Bosch eyeing 60% global market share.

China's ADAS industry is also in rapid development over the years. Some companies backed by colleges, universities and other research institutions have the research and development ability of core algorithm and have received market recognition. At the same time, some traditional auto parts manufacturers represented by INVO Automotive Electronics, Jinzhou Jinheng Automotive Safety System and HiRain Technologies are flooding into the ADAS market and have realized OEM installation by virtue of resources from the original vehicle manufacturers. In addition, the booming ADAS industry is also favored by capital market, some established or emerging companies such as INVO Automotive Electronics and Forward Innovation Corporation sold partial stake to listed companies. However, the technological gap is still obvious, with a majority of ADAS integration companies deficient of core algorithm or lagged far behind foreign rivals. With most products supplied to independent vehicle factories, it's rather difficult for them to enter the supply chain of joint venture factories at this stage.

Global and China Advanced Driver Assistance System (ADAS) Industry Report, 2015-2019 focuses on the following:

- ✘ Overview of automotive ADAS, including classification of ADAS, laws, regulations and rating requirements in major countries, consumer cognition, functions and technical schemes of main ADASs.
- ✘ Analysis on global ADAS industry chain, covering market size, technical features, companies of sensor, chip, system integration, etc.;
- ✘ Analysis on global and China's ADAS application and competition pattern, involving installation ratio, market size, as well as market share of major system integrators in the world;
- ✘ Analysis on major ADAS chip/solution suppliers and system integrators worldwide, including operation and financial conditions, ADAS technologies and relevant business.



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