Global and China Vision ADAS Industry Report, 2015-2020

Feb. 2016

ResearchInChina
www.researchinchina.com

ResearchInChina

The Vertical Portal for China Business Intelligence

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.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

Global and China Vision ADAS Industry Report, 2015-2020 focuses on the followings:
1. Global vision ADAS system market and industry
2. Lane detection
3. Emergency braking (Anti-collision)
4. Night vision and adaptive high beam system
5. Parking Assist
6. Vision ADAS Companies

Camera-based vision ADAS systems can be divided into several categories of applications: 1) Lane Detection, i.e., LDW/LKA/LCA (Lane Centering Assist) to prevent the car from deviating in the working state of either ACC or TJA (Traffic Jam Assist); 2) Obstacles Detection and Recognition, i.e., FCW (Forward Collision Warning)/AEB (Autonomous Emergency Braking); 3) Surroundings Display, i.e., Parking Assist, including Rear View and 360°Surround View. 4) BSD (Blind Spot Detection); 5) HBA (High Beam Assist) and Night Vision.

In application field, warning-only ADASs will gradually exit market, while the ADASs with actuator represent the mainstream in the future. For example, it is hard for drivers to take prompt countermeasures, as the warning time of FCW is no more than 3 seconds. Moreover, AEB (Autonomous Emergency Braking) may become the most important ADAS application. AEB will be a mandatory safety function across the world during 2021-2025.

Future orientation of development will be stereo camera rather than mono camera, especially in AEB field. As AEB concerns human life, there must be as much performance redundancy as possible, thus ensuring the safety of drivers to the utmost extent. Stereo camera has an overwhelming advantage over mono camera in the aspect of pedestrians recognition. However, the majority of companies (OEMs & Tier 1 suppliers) still adopt mono camera, as AEB is largely an optional component rather than a standard one, and the costs of stereo camera are much higher, resulting in higher price and low popularity.

Pedestrians Recognition will be a must of next-generation AEB, meaning that stereo camera has to be employed. Mercedes-Benz, Subrau, Jaguar, and Suzuki have adopted stereo camera from the very beginning, while VW, Toyota, Honda, and Nissan all employ stereo camera in their experimental models.

As to Tier 1, Hitachi Automotive System has used stereo camera at the very start, while Continental, Bosch, Denso, and Fujitsu Ten see stereo camera as the priority of development. These companies are iconic ones in automobile industry and their moves represent the direction of automobile industry as a whole.

Global automotive camera module shipments approximated 50.3 million pieces in 2015 and are expected to reach 62.1 million pieces in 2016, 141 million pieces in 2020, and 246 million pieces in 2025. There are three cameras on each light vehicle on average, respectively for LKA, AEB, and Parking. Unlike mobile phone camera modules, automotive camera modules are highly demanding on reliability and range of operating temperature. Major vendors are Panasonic, Sony, Valeo, Fujitsu Ten, MCNEX, Magna, Gentex, Continental, and Hitachi. Panasonic ranks first globally in terms of market share and is far ahead of the second place.

Global automotive vision system market size was worth about USD3.1 billion in 2015 and is expected to hit USD6.1 billion in 2020. Magna, TRW (ZF), Hitachi Automotive System, and Continental are in the first camp, with Magna being the world's largest, and Autoliv, Valeo, Denso, Fujitsu-ten, and Bosch are in the second camp. As the demand from carmakers varies greatly, the market concentration has been lower and this will continue for a considerable time.

ResearchInChina

The Vertical Portal for China Business Intelligence

Table of contents

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Table of contents

Table of contents

ResearchInChina

The Vertical Portal for China Business Intelligence

How to Buy

You can place your order in the following alternative ways:

1.Order online at www.researchinchina.com

2.Fax order sheet to us at fax number:+86 10 82601570

3. Email your order to: report@researchinchina.com

4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng,Landianchang,Haidian District,Beijing Bank Account No #: 110060668012015061217 Routing No # : 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license) ……..2,000 USD

Hard copy …… 2,200 USD

PDF (Enterprisewide license)…..... 3,300 USD

※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.

ResearchInChina

www.researchinchina.com

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- ***Multi-users market reports***
- ***Database-RICDB***
- ***Custom Research***
- ***Company Search***

For any problems, please contact our service team at:

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com