



**Global and China Automotive Millimeter
Wave (MMW) Radar Industry Report,
2016-2021**

Sep. 2017

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

In comparison with lidar, MMW (millimeter wave) radar has more mature technology, wider application and lower costs; its accuracy and stability are also better than camera, and price gap between them is narrowing. Accordingly, it has a big room to grow in ADAS and automated driving fields.

In 2016, global shipments of MMW radar surged by 27.5% to 31.5 million units from a year ago, and the figure is projected to climb to 84 million units in 2021, with an AAGR of 21.7%. As major countries pose higher requirements on use of ADAS functions in their new car assessment program (NCAP), ADAS penetration will rise rapidly, directly driving demand for MMW radar. It is predicted that global MMW radar market size will hit nearly USD6 billion in 2021.

In 2016, China saw pre-installation of MMW radar reach 1.05 million sets, of which 24GHz radars accounted for 63.8%, and 77GHz 36.2%. 24GHz radar is now mainly applied in blind spot detection (BSD), and market demand for it will be Chinese brand models with little installation of BSD; 77GHz radar finds application in adaptive cruise control system (ACC), and some companies also use it in forward collision warning (FCW) and automatic emergency braking (AEB). According to C-NCAP (China-New Car Assessment Program), AEBS will be included in bonus-point system in 2018, in favor of larger demand for 77GHz radars. Additionally, 77GHz radar with smaller size and longer detection range, will squeeze market space of 24GHz radar in the future.

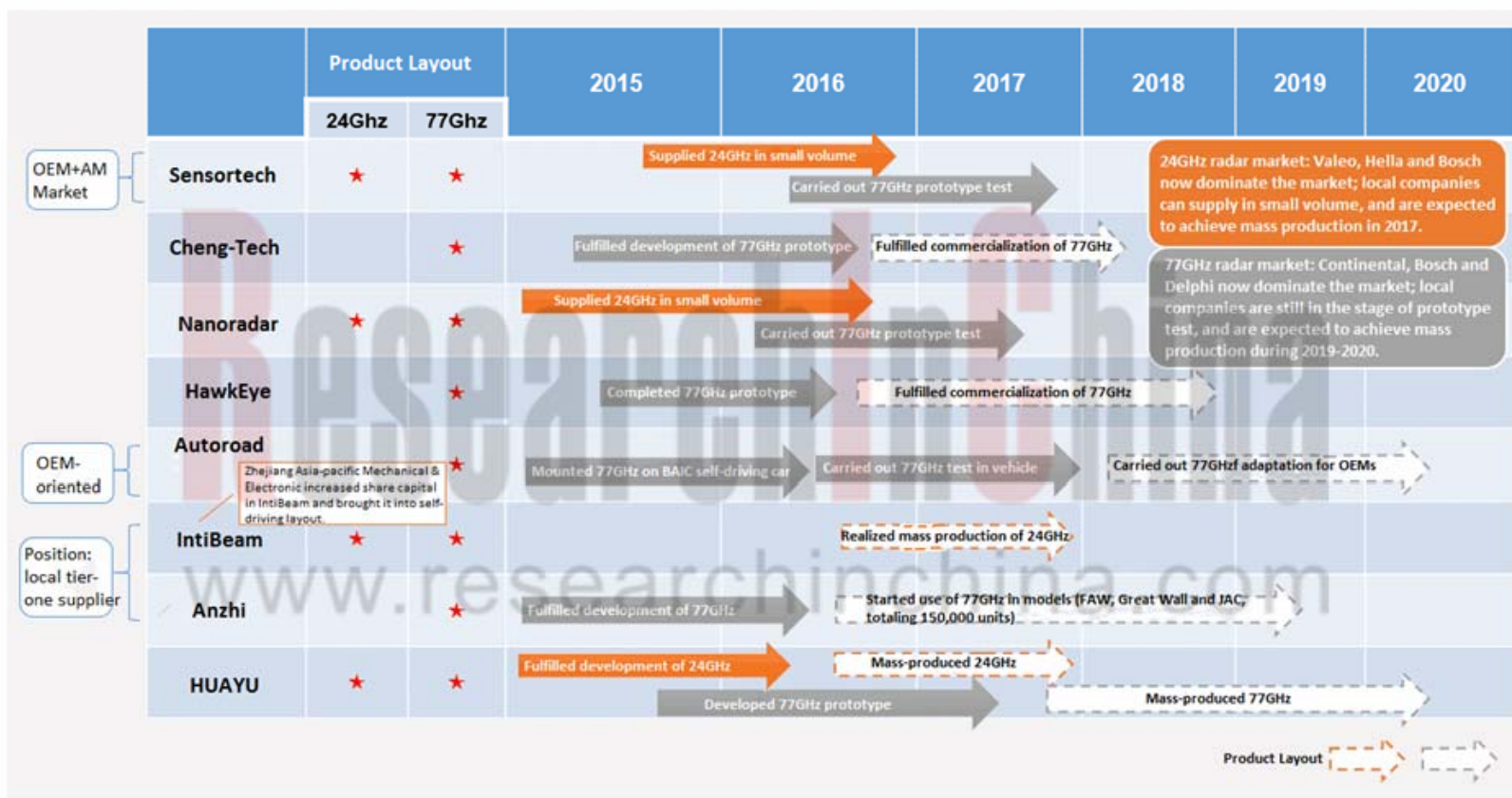
From competition pattern, global MMW radar market is carved up by Bosch, Continental, TRW, Valeo, Hella, Delphi, Denso, Autoliv and Fujitsu Ten, and Chinese market looks like a miniature of global competition. In China, the 24GHz radar market is dominated by Valeo, Hella and Bosch, with a joint share of above 60% in total shipments; the 77GHz radar market is seized by Continental, Bosch and Delphi, together sweeping roughly 80% of total shipments.

Chinese MMW radar companies have made breakthroughs, and Sensortech, IntiBeam and HUAYU Automotive Systems have realized small-volume production, of which HUAYU plans mass production of some 24GHz products in 2017. Sensortech, Cheng-Tech, Nanoradar, HawkEye, Autoroad, Anzhi Automotive Parts and HUAYU have carried out 77GHz prototype test, and some of them are expected to realize mass production during 2019-2020. Nevertheless, besides price, OEMs also stress such technical parameters of products as stability and select suppliers with discretion. Hence, Chinese companies still have a long way to go.

Global and China Automotive Millimeter Wave (MMW) Radar Industry Report, 2016-2021 highlights the following:

- ◆ Overview of MMW radar industry (including product features, working mode, applications and development trend);
- ◆ Global ADAS and automated driving market (including policy environment, market size, and application and comparison of mainstream sensors);
- ◆ Global MMW radar market (including shipments, market size, competition pattern and supply relationship);
- ◆ China ADAS and automated driving market (including policy environment, market size, pre-installation, penetration, and application of mainstream sensors);
- ◆ China MMW radar market (including pre-installation, market size, competition pattern, supply relationship and development trend);
- ◆ Global and Chinese MMW radar companies (including operation, main product types, technology roadmap, product characteristics, etc.).

Development Course and Planning of Major Chinese Automotive MMW Radar Companies



Source: ResearchInChina

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