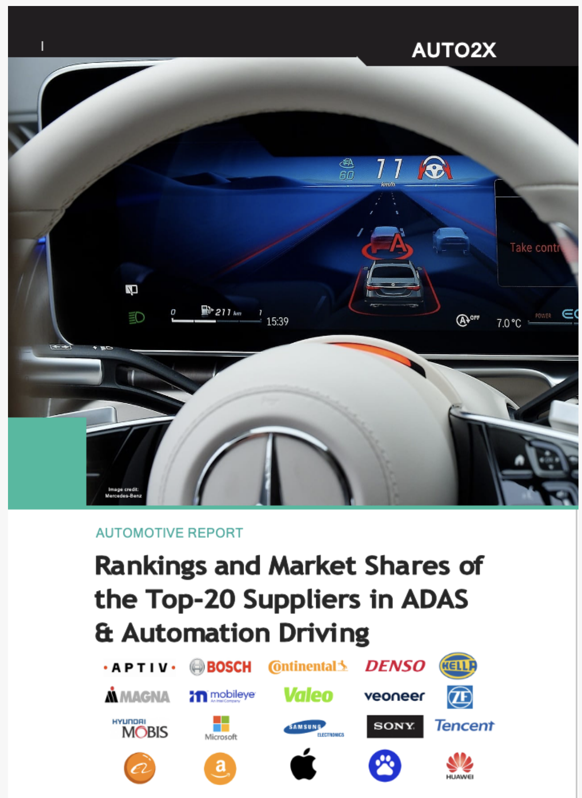
Auto2x publishes the Rankings & Market Shares of the Top-20 ADAS Suppliers in Automated Driving

APTIV, Bosch, Continental, Denso, Hella, Hitachi, Mobis, Magna, Mobileye, Valeo, Veoneer, Zenuity, ZF, Baidu, Huawei, Microsoft, Qualcomm, Samsung, Tencent

LONDON, UNITED KINGDOM, February 6, 2023 /EINPresswire.com/ -- ADAS Suppliers will almost double their revenues between 2021 and 2025 to reach €35 Billion due to the increase in sensor content for Level 3 and Level 4 autonomy. This market presents strong opportunities for incumbent suppliers and OEMs but also for new players with expertise in AI, compute and cloud technologies.



Rankings & Market Shares of the Top-20 ADAS Suppliers in Automated Driving

Auto2x

Read our report to learn about the rankings and market shares of 20 major suppliers in ADAS & Automated Driving by revenues, sensors and applications.

The companies examined include APTIV, Bosch, Continental, Denso, Hella, Hitachi, Hyundai Mobis, Magna, Mobileye, Valeo, Veoneer, Zenuity, ZF, Baidu, Huawei, Microsoft, Qualcomm, Samsung.

1) Learn about the suppliers' automated driving technology capabilities with in-depth analysis of their ADAS portfolio of sensors for Sense-Plan-Act: 77/24GHz radar, forward-looking and surround camera, Lidar, ultrasonics in major markets;

> ADAS Supplier Revenues will almost double between 2020 and 2025 to reach €35 Billion due to the increase in sensor content”
>
> *Auto2x*

2) Understand their value proposition, differentiation and competitive advantage from the assessment of their strategy and execution including
- investments, partnerships, M&A, Joint-Ventures and new facilities to build capacity;
- their organizational structure incl. key divisions for ADAS and key stakeholders;
- initiatives in Automated Driving: pilots and policy

3) Assess their market leadership :
- Rankings by global ADAS revenues 2015-2021 (overall revenues across their product lines)
- Rankings by ADAS-to-Automotive Revenue up to 2021 to demonstrate that Automated Driving is a growing revenue pool;
- By Market shares of ADAS Sensors in Europe, USA and China sensors: radar, camera, Lidar, ultrasonics
- Competitive assessment in terms of Autonomous Driving Readiness to Level 4: Technology, Strategy and Market Position; a forward-looking metric of competitiveness
- Benchmarking of radars, cameras and lidars across Suppliers

ADAS revenues from Top-11 Suppliers grew with a CAGR of 14% between 2018 and 2021 to €15.45 Billion. Most of this revenue comes from sensors (cameras, radars, lidar, ultrasonics and supercomputers) to support Level 1-2 features.

Revenues from ADAS & Automated Driving will almost double between 2021 and 2025 to reach €35 Billion due to the increase in sensor content.

Level 3 and 4 require enhanced redundancy, new centralized architecture, & driver-facing camera among others. This will drive demand for ADAS sensors, super-computers, AI, HD maps etc. It will also drive further collaboration between OEMs and Tier 1s-2s for the development of AD platforms.

“Revenues from ADAS & Automated Driving will almost double between 2020 and 2025 to reach €35 Billion due to the increase in sensor content, says Auto2x”

Suppliers are well-positioned to monetise the strong demand for ADAS components
Already, Top ADAS Tier-1s such as Bosch, Continental and Aptiv, have recorded billions in ADAS Order Intake while they continue to invest to increase production capacity and shorten time-to-market. To close the technological gap and accelerate time-to-market, partnerships and synergies gain momentum to share costs and knowledge.

Major Automotive Suppliers aim to secure their position as leading providers of automated driving solutions. They are also looking to become providers of Mobility solutions and focus on

Software and AI. These forces sparked a strong uptake in the re-organization of ADAS segments of major Suppliers in 2020.

Bosch: To capitalize on the market opportunity for Automated Driving Software, Bosch created a new division called Cross-Domain Computing Solutions, which started operation in Jan’21. The division pulls together the company’s software experts.

Continental: New structure started in Jan’20 with the Chassis & Safety division transforming to the Autonomous Mobility & Safety (AMS) under the Automotive Technologies Group

ZF Group’s structure was adjusted as of January 1, 2019, with the Active & Passive Safety Technology Division divided into three Divisions: Passive Safety Systems, Active Safety Systems, and Electronics and ADAS.

But a further transformation of suppliers is needed to capture software business models. As mobility shifts from product to service, the world’s biggest automotive suppliers are striving to develop capabilities in AI and software. As new competitors enter the market, such as Qualcomm with the acquisition of Veoneer, legacy suppliers will need to protect existing contracts and expand to more carmakers and new business models to retain revenue growth.

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