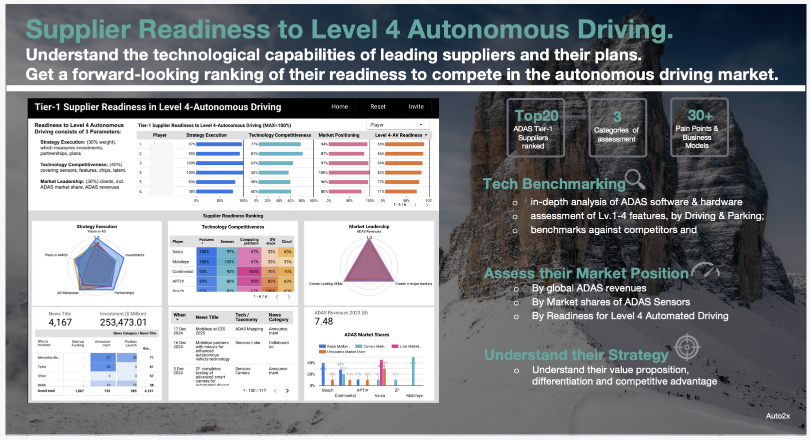
Bosch, Continental, Mobileye and Top Auto2x's Live Ranking of Tier-1 Suppliers in ADAS & Autonomous Driving

Auto2x Reveals Real-time Ranking of the Top-20 Suppliers in Autonomous Driving by Strategy, Technology & Market Leadership



Auto2x, ADAS Supplier Rankings and Readiness in Autonomous Driving

LONDON, UNITED KINGDOM, February 23, 2025 /EINPresswire.com/ -- Auto2x enables real-time market intelligence in Autonomous Vehicles with new Live Ranking of ADAS Suppliers and in-depth reports of suppliers, carmakers and competition.

Clients can subscribe to Auto2x's Ranking and get daily updates, including analysis of strategy, technology and market evolution.

Additionally, Auto2x has released a new report "Supplier Readiness in Level 4 Autonomous Driving Rankings" offering insights into the evolution of the competitive landscape of Advanced Driver Assistance Systems (ADAS) and the roadmaps to Level 4 autonomous driving from technology providers.

> Auto2x's Live Ranking of ADAS Suppliers helps clients assess forward-looking metrics of their readiness to compete in autonomous driving as the market evolves from Level 2 to Level 4."
>
> *Auto2x*

WHO IS THIS REPORT FOR

- This report helps strategy and engineering teams with their strategic planning and go-to-market strategy.
- Engineering and innovation teams benefit from the analysis of technology roadmaps and technology readiness levels.
- Investors and VCs can identify promising opportunities as the autonomous driving market booms unlocking autonomous vehicles (private vehicles, robo-taxis, autonomous trucks), autonomous deliveries, and industrial automation, among others.

WHAT THIS REPORT DELIVERS

Learn about the ADAS 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;
- benchmarking the capabilities of suppliers in autonomous driving software stack, including perception software, features, middleware and their in-house vs. outsourcing decisions.
- assessment of their Lv.1-4 features, by Driving & Parking; and their future roadmap
- benchmarks against competitors in sensors and systems.

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

Assess their market leadership :
- Rankings by global ADAS revenues 2015-2024 (overall revenues across their product lines)
Rankings by ADAS-to-Automotive Revenue up to 2024 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.

Tap into opportunities in perception, actuation, motion and path-planning, as well as new business models, such as autonomous deliveries and industrial autonomous driving.

KEY FINDINGS FROM THE RANKING OF TIER-1 ADAS SUPPLIERS

Competition among Suppliers in ADAS and Autonomous Driving is getting stronger. Emerging Chinese Suppliers and technology giants, such as Baidu and Huawei, threaten the leadership of major Tier-1s in ADAS, such as Bosch, Continental, Valeo and ZF. As sensor content in vehicles rises, suppliers are strengthening their position in next-generation hardware and software, like Cloud, compute, sensors and software stack to unlock new revenue pools.

1) Which suppliers Top Auto2x's Ranking by Readiness to Level 4 Automated Driving?

To assess the readiness of suppliers we quantify their technological competitiveness, their strategy execution and their market positioning.

Auto2x assessed the Top-20 ADAS Tier-1s, including Aptiv, Bosch, Continental, Denso, HL Mando, Magna, Mobileye, Valeo, ZF, in addition to Baidu, Alibaba, Amazon, Huawei, NVIDIA, Qualcomm and others.

- Technology Competitiveness: Continental has a high readiness level in Technology due to a more mature offering in Lidar, SW stack and Computing Platform to monetize the rising sensor content. APTIV ranks high as a competent supplier for Lv.3-4 for carmakers. Bosch and Continental lag behind in Level 3 and Level 4 offerings compared to APTIV. Denso has strong position in Japan, but it’s falling behind globally.

- Strategy Execution: Bosch and Mobileye rank 1st in Autonomous Driving Strategy Execution, followed closely by Continental. This reflects the investments in technology, manpower, strong partnerships and exposure in high-growth markets.

- Market Positioning: Bosch has overtaken Continental, who led the ADAS market in the period 2015-2018 by revenues. Valeo and ZF follow closely. The contracts with OEMs for ADAS and the ability to support driving and parking features for higher levels of automation are a strength. The ranking of the Top ADAS suppliers and new entrants reveals the rise of Mobileye and Baidu in Automotive.

2) How could new suppliers and Tech Giants disrupt major Tier-1s?

Traditional ADAS suppliers still maintain the lion’s share in automotive. But they face competition from US, Chinese and other Tech giants who are capitalizing on their expertise in AI, Cloud and Software transforming automotive.

We have identified a number of opportunities for Tech Companies to enter or disrupt the existing supply chain.
• Autonomous Driving Software Stack: Perception Software (vision, radar, HD maps, sensor fusion), Driving and Parking features.
• Next-gen Perception Hardware for Autonomous Driving: imaging radars, novel cameras, lidars to replace ultrasonics

• Computing, e.g. for Peta-ops chips for Autonomous Driving, Domain Controllers
• EE Architectures: Assess the roadmaps of leading carmakers and suppliers in the development of centralized architectures and their partnerships;
• AI in Autonomous Vehicles: e.g. Generative AI & LLMs for Level 4 Autonomy and in-car AI voice assistants;
• Data-based Business models such as in-car e-commerce
• 5G-6G, Connected Infrastructure and Smart Cities
• Autonomous Shared Mobility and autonomous deliveries

Baidu and Mobileye lead the overall competitiveness. Mobileye spearheads INTEL's Autonomous Driving strategy and has captured a large share in ADAS. Baidu offers competitive technology due to Apollo's strengths.

3) Key Strategies from Autonomous Driving Suppliers of Hardware and Software

New Product Launches from Suppliers demonstrate that Domain Controllers, embedded computing to process perception and scalable platforms emerge as new revenue pool.
- APTIV's Ice Cube Sensor aims at replacing surround-view cameras by incorporating a camera plus a small ultrashort-range radar sensor in one tiny unit.
- APTIV's L2++ Urban Driving/Parking and Behavioral Planning
- Bosch Video Perception and software
- Continental debuted Xelve at CES 2025, a scalable ADAS system for volume and premium market that is the entry point for the Software-defined Vehicle that covers L2-L4.
- Hyundai Mobis unveiled a system to monitor and prevent 10 passenger behaviors that compromise safety
- Valeo unveiled vOS middleware to support all SDV functions

Supply chain announcements showcase the increasing role of SoC, chipset and compute suppliers, such as Mobileye and NVIDIA to help carmakers realise their autonomous plans.
- ZF secured substantial brake-by-wire technology business for light vehicles

Supplier Investments in Start-ups: LG Innotek invested in AOE Optronics to expand its market for optical components used in XR and autonomous vehicle cameras. Magna and Shell invest in autonomous robot start-up Cartken.

4) What to expect in 2025

Mobileye is launching Imaging radar in 2025. Launching Imaging radars could expand its sensor portfolio beyond camera-based ADAS (EyeQ) to attract revenues from existing and new clients, while also getting closer to redundancy for L3-4 Autonomy.

Continental will Spin-off its Automotive segment, demontrating the transformation of automotive suppliers. Continental wants to turn the new company into the "default system integrator for SDV", according to the 2023 Annual Report.

Lenovo entered the Autonomous Driving market with 2,100 TOPS Domain Controller for Level 2-4 Autonomy starting production in 2025.

The fifth generation of Magna's thermal sensing technology is targeted to debut late 2025.

Contact us to learn more information about the ranking and our analysis of the autonomous driving market, including suppliers, automakers (OEMs), start-ups, regulation and innovation.

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