

## Market Analysis & Forecasts



### **Automotive Electronic Controllers — 2019 Edition**

**Analysis of worldwide and regional market trends for 35 automotive electronic controllers | November 2018 | 168 Pages**

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## Automotive Electronic Controllers — Report Overview

### Key features of the study include:

- Part of the Automotive Electronics & Entertainment Systems Service.
- Coverage of 35 automotive electronic controllers, comprising body, chassis, powertrain, safety & ADAS and security systems.
- Analysis of market trends for each system in nine geographic regions: North America, Europe, Japan, China, South Korea, India, Russia, Brazil and Rest of the World.
- Analysis of system installation rates, units and ECU ASP for each system, in each region. Base year is 2018, with forecasts to 2025.
- Analysis of light vehicle production by SAE automation level (L0-5).
- Automotive electronic controller supplier market share analysis in 2018.
- Highly quantitative analysis, with discussion summarized in short, easy to read bullet points.
- PDF and Excel delivery options available.

### System Coverage

The report analyzes the market in units and revenues for 35 automotive electronic controllers. Factory fit (OE) systems are included; aftermarket systems are excluded. 2018 is used as the base year with forecasts to 2025.

- Smart Airbag
- Electric Power Steering
- Conventional Cruise Control
- Rear Electric Windows
- Air Conditioning
- ABS/TCS
- Rain & Light Sensors
- Automatic Transmission
- Vehicle Tracking
- Blind Spot Monitoring
- Night Vision Assist
- Center Stack Displays
- Passive Airbag
- Steer-by-wire
- Intelligent Cruise Control
- Automated Driving Computer
- Driver Monitoring Systems
- Seat Electronics
- Exterior Solid State Lighting
- AEB/ESC
- Tire Pressure Warning
- Keyless Entry
- Head-up Display
- Electric Parking Brake
- Electro-hydraulic Steering
- Electronic Suspension
- Front Door Electronics
- Electronic Instrument Clusters
- Smart Junction Boxes
- Other Body Electronics
- Brake-by-wire
- Engine Control & Ignition
- Alarms/Immobilizers
- Passive Park Assist
- Autonomous Park Assist

## Regional Analysis

For each system, regional breakdowns in terms of region of vehicle production are presented as follows:

- North America
- China
- Russia
- Europe
- South Korea
- Brazil
- Japan
- India
- Rest of the World

## Market Metrics

Further segmentation is provided by region, by system type, as follows:

- Installation Rate
- Revenues (\$)
- Units Installed
- ECU ASP (\$)

## Additional System Analysis

For each of the following systems, additional analysis of the market is presented as follows:

- **Exterior solid state lighting** into: central high mount LED stop lamp, LED daytime running lamp, LED headlamps, other LED exterior lighting.
- **Autonomous park assist** into: standard, smartphone/smartwatch, valet parking.
- **Passive park assist** into: basic systems, advanced systems.
- **Automatic transmission** into: stepped automatic, CVT/EVT, other.
- **Light vehicle production by propulsion type** into: gasoline, diesel, electric vehicle.
- **Light vehicle production** into: conventional ICE, start-stop/mild hybrid, full hybrid/plug-in hybrid, electric vehicle
- **Keyless entry by system type** into: active entry, passive entry.

## Example Table

An example table taken from the report showing the format used to present the market forecasts is shown below.

World Market for Driver Monitoring Systems by Region

Region	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	CAGR (18/25)	DIFF (18-25)	SUM (18>25)
<b>North America</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Europe</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Japan</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>China</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>South Korea</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>India</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Russia</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Brazil</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
<b>Rest of the World</b>													
Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
ECU ASP /\$	0	0	0	0	0	0	0	0	0	0	-	0	0
Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
World Installation Rate	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0	0
World Units Installed /KU	0	0	0	0	0	0	0	0	0	0	-	0	0
World ECU ASP /\$	0	0	0	0	0	0	0	0	0	0 #DIV/0!	-	0	0
World Revenues /\$m	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-	0.0	0.0
Year-on-year Growth	-	-	-	-	-	-	-	-	-	-	-	-	-

Source: Semicast Research

Table Revised: October 2018

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## Analyst Biography

Colin Barnden - Principal Analyst



Colin joined Semicast Research in 2006 and is principal analyst for semiconductor research and vice president of business development. Prior to joining Semicast, he worked for 12 years at IMS Research, rising to the position of Senior Research Director of its Semiconductor Research Group and responsible for analyst coverage on the analog/mixed signal, optoelectronic and embedded processing industries. Colin also set-up and established IMS Research's Automotive Electronics Group. During his tenure, Colin authored dozens of reports and became a well respected industry analyst. He holds a B.S. in Electronic Engineering from Aston University, England and has more than twenty years of experience as an industry analyst.

## About Semicast

Founded in 2006, Semicast has an established reputation at most top 20 semiconductor suppliers, with areas of expertise covering industrial and medical electronics and semiconductors; industrial IoT; automotive electronic controllers; automotive audio, infotainment & navigation systems; automotive semiconductors; and 32-bit microcontrollers.

With more than twenty years of market research experience, our analysts use a combination of technical expertise, a proven method for producing electronics focused market research and specific applications knowledge to produce concise and timely research to help you make effective business decisions.

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