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Sensor Fusion Market Research Report - Global Forecast till 2030

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Description:

Global Sensor Fusion Market Overview

Sensor Fusion Market Size was prized at USD 5.5 billion in 2022. The sensor fusion market industry is projected to grow from USD 6.5 Billion in 2023 to USD 19.3 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 19.70% during the forecast period (2023 - 2030). The rising demand for sensor-based smartphone applications is the key market driver enhancing market growth. Manufacturers and producers are investing in and implementing sensor fusion technology in their products due to the growing requirement to keep a competitive edge over their rivals.

Sensor Fusion Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Sensor Fusion Market Trends

- **Increasing sales of autonomous vehicles to boost the market growth**

Cameras, radar, and LiDAR sensors are necessary for autonomous cars to monitor and assess their surroundings. They frequently require several data inputs from various sources to give the vehicle a comprehensive and unified image of its surroundings in real time within milliseconds. They also need computer capacity and artificial intelligence to assess multidimensional impediments. Sensor fusion is necessary for autonomous cars to satisfy all of these requirements. Throughout the forecast period, creating supporting regulatory frameworks, government financing, and investments in digital infrastructure are anticipated to impact market growth significantly. Sales of autonomous vehicles increased even during the pandemic; in 2020, 11.2 million vehicles with Level 2 characteristics were sold, a 78% increase from the previous year. Therefore, increased sales of autonomous cars are driving the growth of the sensor fusion market revenue.

Due to its numerous technical advantages, sensor fusion is becoming increasingly common in automobiles. According to Aptiv, sensor fusion uses software algorithms to combine data from numerous sensors to produce the most complete and accurate environmental model. Increased data exchange is a key advantage of sensor fusion. The total data produced worldwide was predicted to be over 79 zettabytes in 2021. Because sensors in conventional systems each process inputs independently, the system's decisions are only as good as what each sensor can observe. Nevertheless, with sensor fusion, data from many sensors, including cameras, LiDAR, and radar, are combined. Sharing multiple pieces of data helps decision-makers make wiser choices, improving vehicle safety. Thus the continuous technological advancement in sensor fusion has enhanced the sensor fusion market CAGR globally in recent years.

Sensor Fusion Market Segment Insights

Sensor Fusion Type Insights

The Sensor Fusion Market segmentation, based on type, includes inertial combo sensors type, radar + image sensors type, environmental sensors type, IMU+ GPS type, and others. In 2022, the radar + image sensors type dominated the market with respect to the Sensor Fusion Market revenue. The industry's positive prognosis is mostly due to the enormous global growth of the automotive industry and the increasing attention paid to passenger safety. Also, the requirement for efficient target observation, interception, missile guidance, terrain tracking, and navigation for military and defense applications propels segment expansion.

May 2022: Infineon Technologies has introduced the XENSIV 60 GHz automobile radar sensor (BGT60ATR24C). These sensors are intended for in-cabin monitoring systems (ICMS) to detect and alarm micro-movements and vital signs of left-behinds. This introduction has further broadened the

growth opportunity for the sensor fusion industry.

The second fastest-growing segment in the sensor fusion industry is the IMU+ GPS segment.

Unmanned aerial vehicles are increasingly employed for military and commercial purposes, including research and development, aerial photography, situation awareness, law and order enforcement, disaster management, and relief and rescue operations. Hence, the rising use of IMU+ GPS sensors for sensor fusion positively impacts market growth.

Sensor Fusion Application Insights

The Sensor Fusion Market data has been bifurcated by application into consumer electronics, automotive, military applications, environmental controlling, robotics, and others. In terms of revenue share, the consumer electronics industry led in 2022. The spread of smartphones and tablets worldwide is anticipated to drive demand throughout the projection. Preferences for smart devices and increased disposable income may further fuel the market. Due to the growing trend of two cameras per device and the demand for high-end cameras in gaming platforms, the demand for the product has increased.

Figure 1: Sensor Fusion Market, by Application, 2022 & 2030 (USD Billion)

Sensor Fusion Market, by Application, 2022 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

The second fastest-growing segment in the sensor fusion industry is the automotive sector. A significant aspect influencing the segment's revenue growth is the rising demand for sophisticated temperature and pressure sensing in the automobile industry. Temperature sensing and control play one of the automotive electronics' most important and well-established functions.

Sensor Fusion Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific and Rest of the World. The North America Sensor Fusion market accounted for USD 2.51 billion in 2022 and is expected to exhibit a significant CAGR growth during the study period. Over the projected period, North America is anticipated to dominate the market due to features including well-established clusters of automotive firms and housing some of the major technology companies in the world, like Google, Microsoft, Apple, etc. the region has been a pioneer in autonomous vehicles. One of the main factors influencing revenue growth is the rising number of start-ups in the region investing in electronics equipment and sensor technology. For instance, two Canada-based start-ups, Pontosense and Gen Device, launched in 2021 and 2020, respectively, invested in sensor technology.

Further, the major countries studied in the market report are Canada, U.S, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 2: SENSOR FUSION MARKET SHARE BY REGION 2022 (%)

SENSOR FUSION MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe's sensor fusion market accounts for the second-largest market share. The key factors driving the expansion are the government's expanding programs and policies supporting the markets for automobiles, IT healthcare equipment, and devices and increased investments in research and innovation facilities. The region's automotive industry is also rapidly growing, with Germany dominating this industry. In Germany, the number of cars produced in 2022 climbed by 11% from 2021 to 3.4 million. Further, the German sensor fusion market held the largest market share, and the UK sensor fusion market was the fastest-growing market in the European region.

The Asia-Pacific Sensor Fusion Market is expected to grow at the fastest CAGR from 2022 to 2030. One of the key factors propelling this region's market revenue growth is the expanding number of government initiatives to digitalize industrial infrastructure. For instance, Digital India, the government of India's signature effort, intends to make India a fully digital economy. It is predicted that there will be a large increase in electronic equipment that uses various sensors due to governments in the region's increasing efforts to digitalize infrastructure, business, and other aspects of society. Moreover, the China sensor fusion market held the largest market share, and the India sensor fusion market was the fastest-growing market in the Asia-Pacific region.

Sensor Fusion Key Market Players & Competitive Insights

Major market players are investing huge amounts of money in R&D to expand their product offerings, which will spur further growth in the sensor fusion market. With significant market developments like introducing new products, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations, market participants are also undertaking various strategic initiatives to expand their global footprint. To grow and survive in an environment where competition is fierce and the market is growing, competitors in the sensor fusion industry must provide affordable products.

Manufacturing locally to cut operational costs is one of the main business methods manufacturers use in the global sensor fusion industry to benefit customers and increase the market sector. The sensor fusion industry has recently given medicine some of the most important advantages. The sensor fusion market major player, including Bosch Sensortec GmbH, Kionix, Baselabs GmbH,

STMicroelectronics, and others, aims to increase market demand by funding R&D initiatives.

Continental AG, also known as Continental or Conti, is a German multinational automobile parts manufacturing firm that specializes in tires, brake systems, interior electronics, automotive safety, engine and chassis components, tachographs, and other automotive and transportation elements. Continental creates cutting-edge technologies and services for the sustainable and connected mobility of people and things. In April 2021, Continental AG will offer new radar sensors with 360-degree coverage and increased range. The sixth-generation sensor was designed as a modular system with minimal complexity, which allows for prospective spending, cost savings, and improved performance.

Also, SmartSens Technology (Shanghai) Co., Ltd. is a firm that designs high-performance CMOS image sensor (CIS) chips. Its headquarters are in Shanghai, with research facilities in other cities worldwide. SmartSens' CMOS image sensors offer superior imaging solutions for various applications, including surveillance, machine vision, and automobile cameras. In March 2022, SmartSens introduced the SC550XS, their first 50MP ultra-high resolution 1.0µm pixel size image sensor. To achieve great image performance, the new device employs the sophisticated 22nm HKMG Stack process as well as SmartSens' several unique innovations, including SmartClarity@-2 technology, SFCPixel® technology, and PixGain HDR® technology.

Key Companies in the sensor fusion market include

- Invensense
- STMicroelectronics
- NXP Semiconductors
- Bosch Sensortec GmbH
- Kionix
- Analog Devices
- Renesas Electronics Corp
- Hillcrest Labs
- Microchip Technologies
- Senion
- Baselabs GmbH
- Memsic

Sensor Fusion Industry Developments

April 2020: Phantom AI, a business based in the United States, has raised USD 22 million in Series A funding headed by Celeres Ventures and joined by Ford Motor and South Korean telecom giant KT Corporation. Phantom AI's PhantomFusion solution is a self-contained sensor fusion and object-tracking system that combines all raw data obtained from multiple vehicle sensors. It can also combine data from up to six cameras and six radars around a vehicle.

March 2020: SensPro, a high-performance sensor hub DSP architecture developed by CEVA Inc in the United States, is designed to handle a wide range of sensor processing and sensor fusion workloads for devices. It includes a powerful set of software and development tools to help with system design, including an LLVM C/C++ compiler, an Eclipse-based integrated development environment (IDE), OpenVX API, and OpenCL software libraries.

Sensor Fusion Market Segmentation

Sensor Fusion Type Outlook

- Inertial Combo Sensors Type
- Radar + Image Sensors Type
- Environmental Sensors Type
- IMU+ GPS Type
- Others

Sensor Fusion Application Outlook

- Consumer Electronics
- Automotive
- Military Application
- Environmental Controlling
- Robotics
- Others

Sensor Fusion Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan
 - India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
- Rest of the World
 - Middle East
 - Africa
 - Latin America

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