

Global Market of Intelligent Parking Assist Systems: Key Research Findings 2014

◆ Research Outline

Yano Research Institute has conducted a study on the global market of intelligent parking assist systems with the following conditions:

1. Research period: June to August, 2014
2. Research target: Manufacturers of automobiles, system/car parts suppliers, and device manufacturers
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/e-mail, and literature research

<What are intelligent parking assist systems?>

An intelligent parking assist system is a system installed in a car to help the driver park the car by using cameras and/or ultrasonic sensors. An intelligent parking assist system in this research indicates a camera system (consisted of rear-view and surrounding-view cameras to monitor rear view and surrounding view of the vehicle) and an ultrasonic sensor system (equipped with corner sensors that detect and warn obstacles, and a parking assist function that automatically controls parking operation).

<What is the intelligent parking assist system market?>

The market size of intelligent parking assist systems is calculated by adding shipment volume of cameras (image sensors), ultrasonic sensors, and ECU (Electronic control unit) installed in a passenger car or a commercial car weighing 3.5 tons or less. Note that display monitors are not included in the calculation.

◆ Key Findings

■ Size of Global Market of Intelligent Parking Assist Systems in 2013 Rose by 13.7% on Y-o-Y Basis to Attain 129.498 Billion Yen

With adoption expanded in U.S. and Europe the global market of intelligent parking assist systems in 2013 rose by 13.7% from the previous year to achieve 129.498 billion yen, based on the shipment value of manufacturers. Among the entire market, the market of camera systems rose by 15.1% to reach 98.755 billion yen, occupying 76.3% of the entire market, whereas ultrasonic sensor market rose by 9.2% to attain 30.743 billion yen.

■ Prospective Global Market Size of Intelligent Parking Assist Systems Expands to 390.596 Billion yen by 2025

Enhancement of the new car safety assessment standard by Euro NCAP for 2016 and mandatory installation of rear-view cameras by 2018 in U.S. have encouraged adoption of intelligent parking assist systems especially in advanced countries. The global market of intelligent parking assist systems is expected to attain 390.596 billion yen by 2025.

■ **Ratio of Installing Camera Systems Higher in US and China, whereas Ratio of Ultrasonic Sensors Higher in Europe**

When looking at the global market of intelligent parking assist systems by region for 2013, the camera systems market is dominated by U.S. with 52.0% of the market, China occupies 24%, Europe 13%, and Japan 4%. Adoption of camera systems in U.S. is particularly increasing, partly because installation of rear-view cameras in automobiles is scheduled to be mandatory in 2018. In China, consumers purchasing automobiles of foreign manufacturers tend to install rear-view and surrounding-view cameras and corner sensors. In Japan, surrounding-view cameras are attracting attention. On the other hand, the intelligent parking assist systems using ultrasonic sensors are adopted mainly in Europe, occupying 47% of the market, whereas U.S. accounts for 30%, followed by China and Japan respectively accounting for 18% and 2%.

◆ **Report format:**

Published report “Intelligent Parking Assist System Market 2014”

Issued on: August 29, 2014

Language: Japanese

Format: 211 pages in A4 format

Price: 130,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

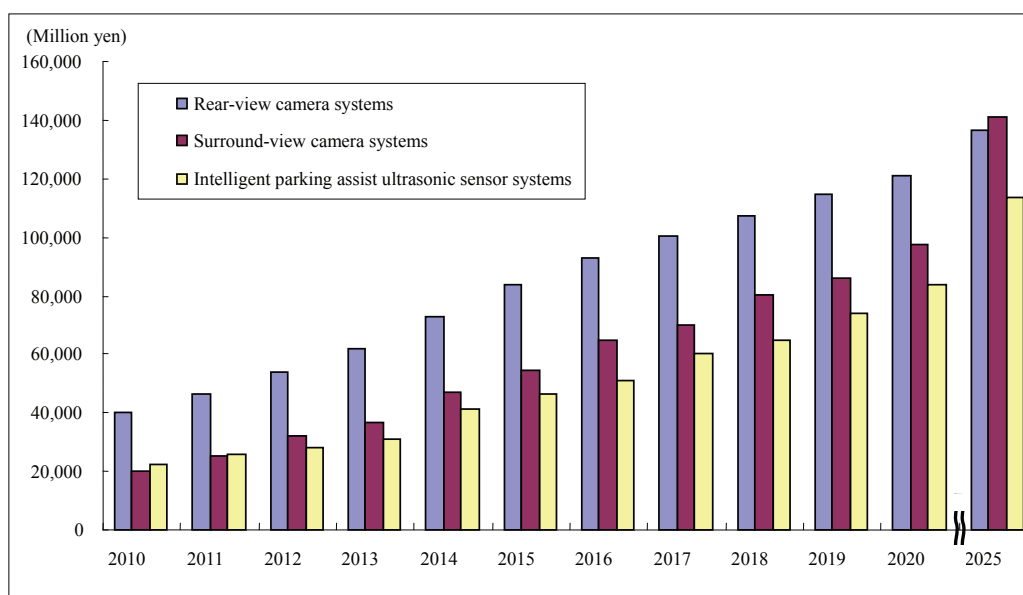
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■ **Figure & Table 1: Transition and Forecast of Global Market Size of Intelligent Parking Assist Systems**



(Million Yen)

Category/Yr.	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2025
					Prospect	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast	Forecast
Intelligent Parking Assist Camera System	60,252	71,589	85,782	98,755	119,506	138,024	157,783	170,369	187,855	200,563	218,399	277,095
Rear-view camera	40,168	46,249	53,718	61,842	72,557	83,800	92,900	100,311	107,284	114,542	121,005	136,219
Surrounding-view camera	20,084	25,340	32,064	36,913	46,949	54,224	64,883	70,058	80,571	86,021	97,394	140,876
Intelligent Parking Assist ultrasonic sensor system	22,408	25,577	28,154	30,743	41,509	46,297	51,312	59,945	64,723	74,191	83,639	113,501
Total	82,659	97,166	113,937	129,498	161,015	184,321	209,095	230,314	252,578	274,754	302,038	390,596

Notes:

1. The figures are based on the shipment value of manufacturers.
2. The market size is calculated by adding shipment volume of cameras (image sensors), ultrasonic sensors, and ECU (Electronic control unit) installed in a passenger car or a commercial car weighing 3.5 tons or less. The market size in this research does not include demands for carbon fiber/CFRP used for hydrogen tanks for fuel-cell cars.
3. Intelligent parking assist camera system market are total values of rear-view cameras and surrounding-view cameras
4. The values are rounded so that some parts of sums in the figure and table may not match.