



Unprecedented insight into the world
of driver(less) technology

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Fully autonomous vehicles are expected to go from concept to tens of millions sold per year over the next two decades.

This seismic shift will not only usher in a new era of in-vehicle user experience but of vehicle ownership as well.

It also opens up a whole new industry for technology and associated components.

There is profit to be made—but what is the best path forward?





The automotive industry is entering a new era

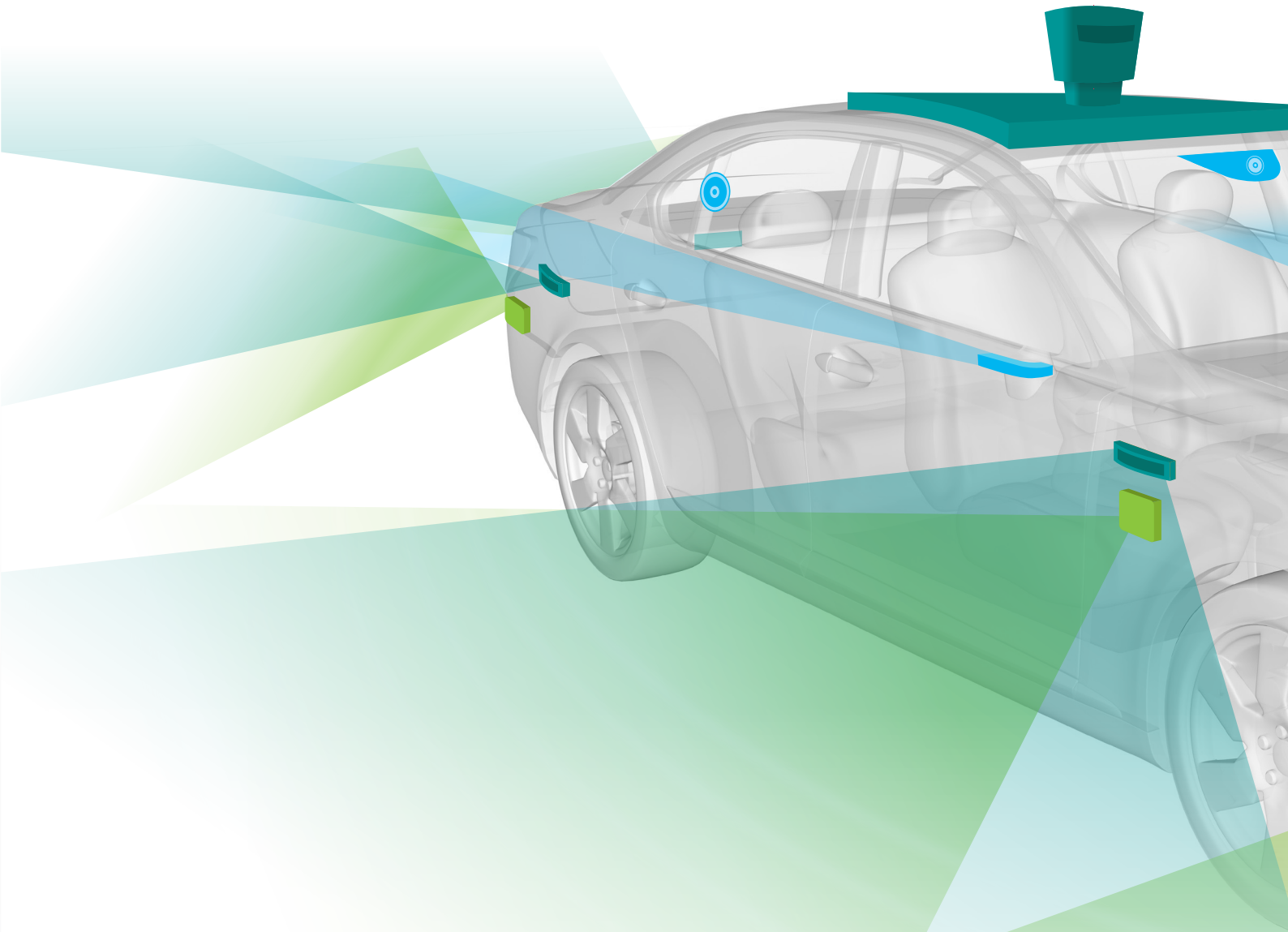
In a rapidly evolving environment with little historical context, OEMs and suppliers alike struggle to understand what the future holds and how regulation, cost, New Car Assessment Programs (NCAP), consumer acceptance, and other factors will impact advanced driver assistance systems (ADAS) and autonomy adoption.

IHS Markit provides insight into OEM technology strategy with regards to autonomy and ADAS applications and features.

Our new Autonomy Forecasts provide access to OEM deployment strategies, detailed technology specifications, and insight into how different autonomy levels are delivered from a sensor hardware perspective.

The service also identifies established and emerging suppliers as well as OEM sourcing structures.

From zero to billions...



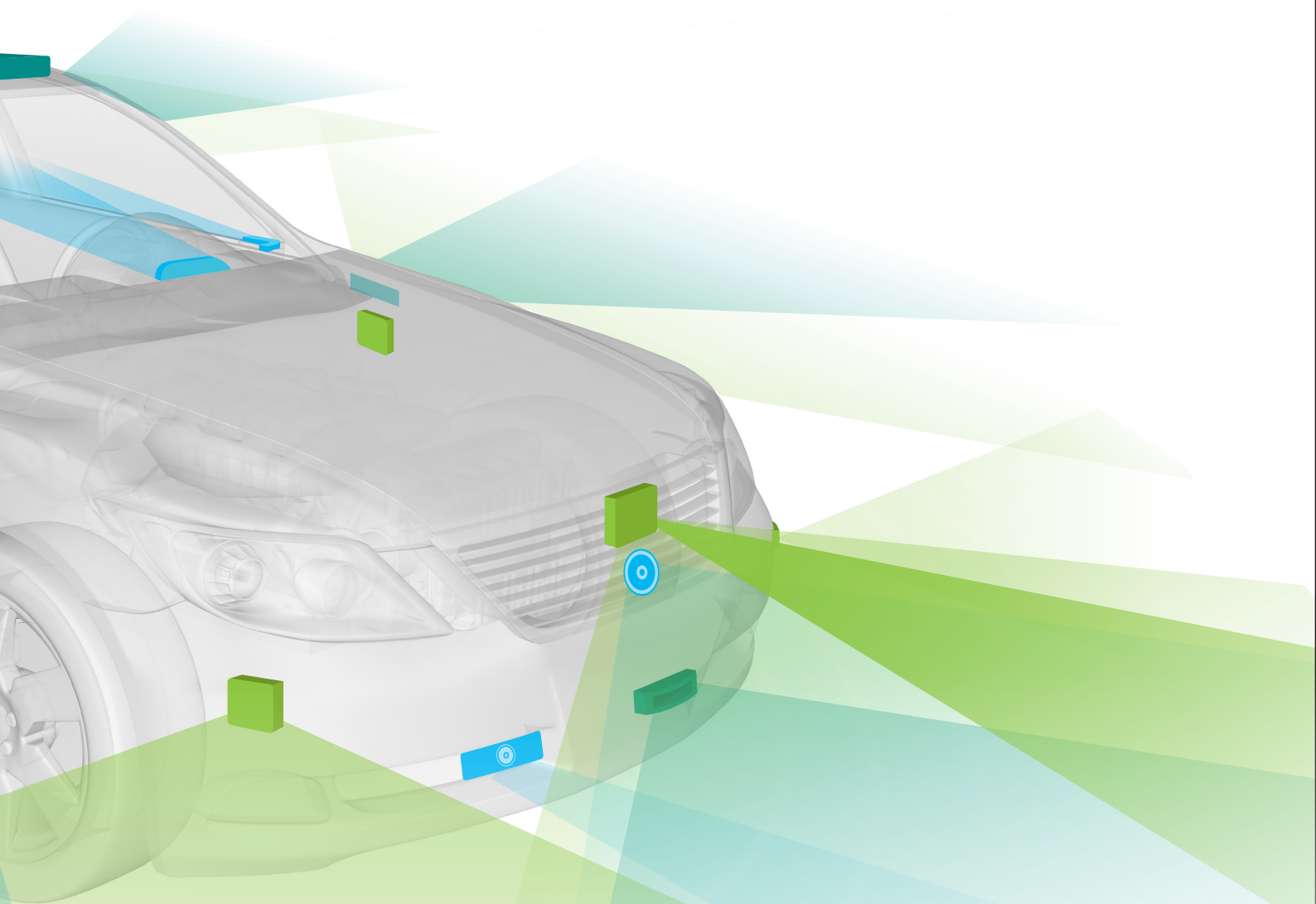
>50%...

...of global population in 2030 will live in an area where fully autonomous driving is legal

All...

...regional NCAP programs will include SAE Level 0 ADAS features as part of their new car evaluation programs

...autonomy components are expected to
surge over the next 12 years



76%...

...of new vehicle intenders surveyed rate automated driving systems as desirable when considering their next vehicle purchase

16%...

...average price reduction across all lidar sensor types between 2018 and 2030

Enabling insights for multiple stakeholders

IHS Markit Autonomy Forecasts provide clients with:



Automotive Suppliers

Market and Competitive Intelligence

- OEM sourcing strategy analysis
- Intelligence on competition (contract awards)
- Monitor autonomy and ADAS market trends

Product Strategy / Corporate Strategy

- Assess technology trends for product or M&A investment decision-making
- Capacity planning and decision-making

Business Development, Account Planning Teams

- Intelligence on competition and target customers
- New business opportunity targeting
- Support in responding to RFQs
- Defining annual sales strategy (volumes)



Automakers

Engineering / Research Development

- Technology trends
- Ability to benchmark competitors' technology strategies
- Identify key suppliers with whom to partner

Procurement

- Ability to identify key suppliers
- Ability to understand supplier capacity-utilization for negotiations



Financial Institutions

- Assessment of revenue generation opportunities for suppliers of hardware
- Technology analysis and the players' competitive positions to advise investors

Unprecedented in scope, granularity and details

Service deliverables include:

Sensor Technology and Supply Chain

- Lidar
- Radar
- Camera

Autonomy Features

- 12 application families
- 46 vehicle features

Autonomy Levels

- SAE Level 0 – no automation
- SAE Level 1 – driver assistance
- SAE Level 2 – partial automation
- SAE Level 3 – conditional automation
- SAE Level 4 – high automation
- SAE Level 5 – full autonomy

12 Year Forecasts

- Updated twice a year

3

sensors

46

features

6

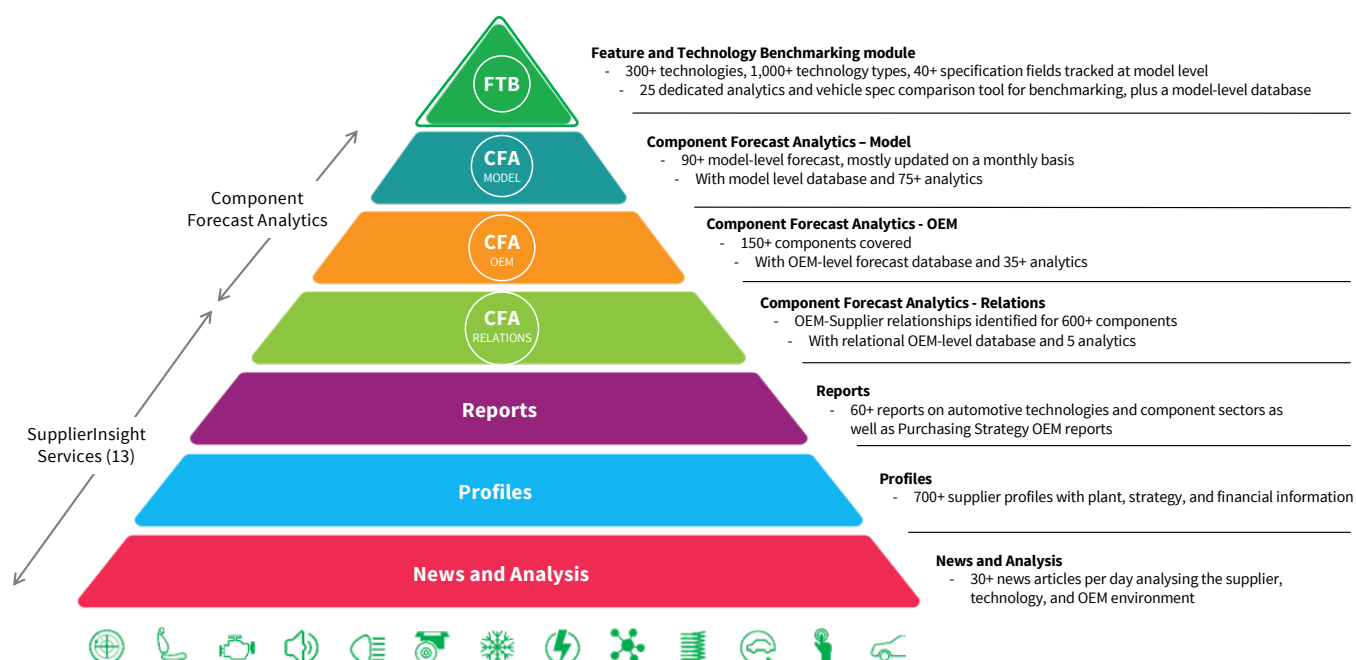
autonomy
levels

12

year
forecast

Automotive Supply Chain and Technology portfolio

From insight into the current environment to forecasts of individual components, IHS Markit provides unrivaled access to automotive technologies. The Autonomy Forecasts are offered at four different levels of granularity across the FTB and CFA portfolios.



Learn more at ihsmarkit.com/automotive-autonomy or email automotive@ihsmarkit.com

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About IHS Markit

IHS Markit (NASDAQ: INFO) is the automotive industry's leading source for market-wide insight, expertise, and advanced planning solutions. With a reputation of enabling better decisions and better results for nearly a century, the world's leading OEMs, suppliers, and their transportation partners rely on IHS Markit to power growth, improve efficiency, and drive a sustainable competitive advantage.

Our automotive offerings and expertise span every major market and the entire automotive value chain—from product planning to marketing, sales, and the aftermarket. Headquartered in London, our automotive team is part of IHS Markit's information and analytics powerhouse that includes more than 14,000 colleagues in 34 countries, covering energy, chemical, aerospace & defense, maritime, financial, technology, and media & telecommunications.