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Global Software Defined Vehicles Market

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Abstracts

Summary:

The global market for software-defined vehicles (SDV) was valued at $391.2 billion in 2024 and is estimated to increase from $475.4 billion in 2025 to reach $1.6 trillion by 2030, at a compound annual growth rate (CAGR) of 27.3% from 2025 through 2030.

An SDV primarily relies on software to manage its operations, add functionality and enable new features. SDVs are the next step in the automotive industry's evolution and serve as the foundation for many other advancements, such as self-driving and connected cars. The automotive industry is shifting from non-connected software-enabled cars to immersive SDVs, offering a more interactive and comprehensive experience. Original equipment manufacturers (OEMs) prioritize custom software applications for vehicles, including over-the-air (OTA) updates, subscription flexibility for on-demand feature upgrades, and cross-domain ecosystems.

A major factor driving the SDV market is the limitations of conventional vehicles in terms of predefined hardware configurations. When faults are discovered in hardware, extensive recall campaigns are frequently required, resulting in significant costs and logistical challenges for manufacturers. SDVs have replaced many hardware-controlled functionalities with software and OTA updates. This change reduces the need for recalls by allowing for online resolution of common issues. Car owners can quickly fix software faults and optimize performance without visiting service centers. SDVs reduce operational costs for manufacturers by decreasing physical recalls and servicing campaigns while improving customer satisfaction by minimizing disruptions.

In the coming years, the automotive industry is preparing for fully integrated, immersive platforms rather than standalone products. Compared with non-connected vehicles, SDVs represent a significant shift in customer expectations and technological

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capabilities. OEMs and technology providers can generate new revenue streams by monetizing SDV platforms with innovative software and services. This shift from a hardware-centric to a software-centric business model boosts profitability and is expected to create ongoing customer engagement and loyalty opportunities.

SDV platforms can be monetized using various strategies. OEMs, for example, can charge a fee or subscribe to premium features such as advanced driver assistance systems (ADAS), enhanced navigation and entertainment. These features can be dynamically updated and tailored to specific user preferences in the coming years. Furthermore, data-driven services, including predictive maintenance, remote diagnostics and fleet management, can provide valuable insights and operational efficiencies to individual users and commercial fleet operators in the long run.

Report Scope

The software-defined vehicles (SDV) market report is segmented into SDV type, electrical and electronic architecture, vehicle type and propulsion. The report analyzes the market for the U.S., Canada, China, Japan, Germany, France and the U.K., where the opportunity for SDV is gaining momentum. The regional analysis covers North America, Europe, Asia-Pacific and the Rest of the World (South America, the Middle East, and Africa).

The report is prepared in an easy-to-understand format. The tables and figures illustrate historical, current and future market scenarios. The report considers 2024 as the base year with 2025 as the estimated year, and market values are forecasted for five years until 2030. All market values in the report are in US$ (billion).

Report Includes

44 data tables

Industry insights and a brief overview of the global market data for software-defined vehicles

Analyses of the global market trends, with data of 2024, estimates for 2025, and projections of five-year compound annual growth rates (CAGRs) through 2030

Estimation of the actual market size and revenue forecasts for software-defined vehicles, and market share analysis by SDV type, electrical and electronic architecture, vehicle type, propulsion type, source, and function of these products with major regions and countries involved

Country specific sales data and analysis for the U.S., Canada, Mexico, U.K., France, Germany, Italy, China, Japan, India, South Korea, South America, Middle East and Africa

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