

Europe Connected Car Market: Focus on Application, Vehicle Type, Network Type, Sales Channel, Form, Transponder, Hardware, and Country-Level Analysis - Analysis and Forecast, 2024-2034

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Abstracts

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This report will be delivered in 7-10 working days. Introduction to Europe Connected Car Market

The Europe connected car market is projected to reach \$130.29 billion by 2034 from \$26.52 billion in 2024, growing at a CAGR of 17.26% during the forecast period 2024-2034. The rapid integration of C-V2X communication, AI-powered mobility services, and widespread 5G deployment in Europe are being driven by growing consumer demand for better safety, infotainment, and telematics solutions. OEMs and fleets are adopting them more quickly due to the EU's strict Euro NCAP safety ratings, impending Euro 7 emissions regulations, and aggressive electrification and autonomous goals. Connected mobility platforms, smart telematics, and over-the-air software updates are being heavily invested in by major European players like Continental AG, Bosch, Valeo, Daimler, Volkswagen, and up-and-coming software-defined vehicle specialists. Europe is establishing itself as a global leader in next-generation automotive connection and mobility-as-a-service solutions with the help of EU innovation projects (Horizon Europe, Digital Europe) and coordinated C-ITS pilot corridors.

Market Introduction

The integration of digital, telecommunications, and automotive technologies is causing a rapid transformation of the connected car sector in Europe. Advanced telematics,

entertainment systems, real-time navigation, predictive maintenance alerts, and vehicle-to-everything (V2X) communication capabilities are now all integrated into European connected cars. In line with the EU's larger objectives for digital mobility, emissions reduction, and road safety enhancements, these technologies make driving safer, smarter, and more efficient.

Growing consumer expectations for seamless digital experiences and stricter laws requiring improved safety features, emissions monitoring, and interoperability standards are driving a dramatic increase in demand for connected cars. OEMs are embracing intelligent connection solutions more quickly thanks to initiatives like the Euro NCAP's safety criteria and the impending Euro 7/VII rules. Additionally, a supportive environment for connected mobility is being created by the development of 5G networks, the growth of cooperative intelligent transport systems (C-ITS), and investments in smart city infrastructure.

Software-defined vehicles that can receive updates over the air and support autonomous capabilities are being developed by major automakers and Tier-1 suppliers in partnership with telecom companies and IT heavyweights. Notwithstanding the encouraging trend, issues including cybersecurity threats, data privacy issues, high implementation costs, and legislative fragmentation throughout Europe continue to exist. However, as connectivity becomes increasingly important to the future of mobility, the market is expected to increase steadily.

Market Segmentation

Segmentation 1: by Application

Mobility Management

Telematics

Infotainment

Driver Assistance

Navigation

Others (eCall, Autopilot, Remote Diagnostics, Home Integration)

Segmentation 2: by Vehicle Type

Internal Combustion Engine (ICE) Vehicle

Battery Electric Vehicle (BEV)

Hybrid Electric Vehicle (HEV)

Plug-in Hybrid Electric Vehicle (PHEV)

Segmentation 3: by Network Type

Operational Data

Dedicated Short-Range Communication (DSRC)

Cellular

Satellite

Segmentation 4: by Sales Channel

Original Equipment Manufacturer (OEM)

Aftermarket

Segmentation 5: by Form

Embedded

Integrated

Segmentation 6: by Transponder

Onboard Unit

Roadside Unit

Segmentation 7: by Hardware

Head Unit

Central Gateway

Intelligent Antennas

Electronic Control Unit (ECU)

Telematics Control Unit

Keyless Entry System

Sensors

Segmentation 8: by Region

Europe (Germany, France, U.K., Italy, and Rest-of-Europe)

Europe Connected Car Market Trends, Drivers and Challenges-

Trends

C-V2X communication, 5G connectivity, and AI-powered mobility solutions are all contributing to the fast growth of the connected automobile market in Europe. With the ability to provide predictive maintenance, real-time over-the-air (OTA) updates, and improved in-vehicle personalisation, software-defined vehicles are becoming more and more popular. Innovation in data-driven services and autonomous driving features is being fuelled by expanding partnerships among telecom providers, digital businesses, and OEMs. Cooperative intelligent transport systems (C-ITS) corridors and mobility-as-a-service (MaaS) platforms are changing urban transportation in key European cities.

Drivers

Strict EU laws, such as the impending Euro 7/VII emissions standards and the mandated Euro NCAP safety requirements, are important drivers of the use of linked technologies. Deployment is accelerating due to rising consumer demand for improved navigation, entertainment, and safety features. The deployment of strong network infrastructures is closely related to the drive towards autonomous driving and vehicle electrification. Market expansion is further supported by significant EU financing through national smart mobility projects and programs like Horizon Europe.

Challenges

Smaller OEMs and fleet operators face obstacles because of high implementation costs, particularly for full 5G V2X ecosystems. Cross-border interoperability is made more difficult by member state policies that are fragmented. OEMs are challenged to safeguard connected platforms due to growing cybersecurity risks and GDPR data privacy concerns. Furthermore, fleets of outdated cars impede the complete shift to interconnected ecosystems, necessitating hybrid approaches.

How can this report add value to an organization?

This report adds value to an organization by providing in-depth insights into the Europe connected car market, enabling informed decision-making and strategic planning. It highlights emerging technologies, market trends, and competitive dynamics, helping organizations identify growth opportunities and align their offerings with industry demands. The report's detailed segmentation and regional analysis support targeted market entry strategies, while its coverage of regulatory frameworks and cybersecurity measures ensures compliance with evolving industry standards. By leveraging this report, organizations can drive innovation, enhance operational efficiency, and gain a competitive edge in the rapidly evolving connected mobility ecosystem, ensuring sustainable growth and technological leadership.

Key Market Players and Competition Synopsis

The companies that are profiled in the Europe connected car market have been selected based on inputs gathered from primary experts who have analyzed company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

Continental AG

Robert Bosch GmbH

TomTom International BV

Valeo

AUDI AG

Aptiv

HERE Technologies

Intellias

Companies not part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

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