

Global Software-Defined Vehicles Market Size study & Forecast, by Application (ADAS & Safety, Connected Vehicle Services, Autonomous Driving, Body Control & Comfort System, Powertrain System), by Vehicle Type, by Propulsion Type (ICE Vehicles, Electric Vehicles), by Level of Autonomy (Level 1, Level 2, Level 3, Level 4, Level 5), and Regional Analysis, 2023-2030

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Abstracts

Global Software-Defined Vehicles Market is valued at approximately USD 34.2 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 19% over the forecast period 2023-2030. A Software Defined Vehicle is a vehicle that relies heavily on software to enable its functionalities and operations. This progressive transformation of automobiles involves shifting from a predominantly hardware-oriented product to a software-focused device on wheels, leading to the emergence and expansion of this specific category. The increasing adoption of software-defined vehicles is primarily attributed to their semi-autonomous and autonomous capabilities, particularly in scenarios such as monotonous highway driving, navigating through traffic jams, and challenging parking situations. These vehicles incorporate features such as highway pilot, traffic jam assist, and parking assist, where the vehicle's computer assumes situational control, partially or entirely. The growing demand for higher levels of autonomy in vehicles is a significant driver for the expansion of the software-defined vehicles market.

The market demand for software-defined vehicles is primarily fueled by their ability to significantly mitigate accidents resulting from human error. These vehicles are equipped

with advanced safety features such as anti-collision systems and driver assistance technology, which further enhance their safety capabilities. Based on the findings from the U.S. General Services Administration's Office of Motor Vehicle Management, human error is responsible for 98% of car crashes. Additionally, car crashes take place approximately every 5 seconds. Based on the statistics provided by the Centers for Disease Control and Prevention, global roadways witness approximately 1.35 million fatalities annually. This translates to nearly 3,700 deaths every day, resulting from various types of accidents involving cars, buses, motorcycles, bicycles, trucks, or pedestrians. Additionally, the software-defined vehicles market is propelled by several significant factors, including the escalating demand for connected and autonomous vehicles, the increasing emphasis on enhanced safety features, and the growing need for vehicles that are both environmentally friendly and efficient. However, the cost of software-defined vehicles is typically higher compared to traditional cars, which can limit their accessibility to certain consumers. Software-defined vehicles must have a robust infrastructure that may not be universally accessible in all regions, these are the two factors that may stifle market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Software-Defined Vehicles Market study includes Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022. The growth of the region can be attributed to the concentration of prominent automotive manufacturers and technology companies, coupled with the rising market demand for electric and autonomous vehicles. This convergence of factors is anticipated to drive the expansion and development of the region. Europe is expected to grow significantly during the forecast period, as this region serves as a thriving hub for innovation due to its robust automotive industry and the presence of numerous prominent automotive manufacturers. Its strong foundation in the automotive sector positions it as a center for pioneering advancements in the industry.

Major market player included in this report are:

Tesla, Inc.

Toyota Motor Corporation

Volkswagen Ag

General Motors Company

BYD Company Limited

Hyundai Motor Company

Ford Motor Company

Honda Motor Co., Ltd.

Mercedes Benz Group AG
BMW Group

Recent Developments in the Market:

In October 2022, Hyundai Motor Group (South Korea) revealed its strategic entry into the Software-Defined vehicle market, taking a significant leap forward by introducing Software-Defined vehicles in both gasoline and electric variants. The company aims to have 20 million connected vehicles equipped with its internally developed Integrated Modular Architecture (IMA) and Connected Car Operating System (CCOS) on the road by 2025. This ambitious plan demonstrates Hyundai Motor Group's commitment to advanced vehicle technology and connectivity in the automotive industry.

In October 2022, NVIDIA and Qualcomm have recently unveiled their latest System on Chip (SoC) portfolios for Software-Defined vehicles, namely Drive Thor and Ride Flex SoC. These new offerings are positioned as the 'industry's first super-compute class SoC portfolio' and are aimed at capturing a significant share of the semiconductor segment within the Software-Defined vehicle market. With their advanced capabilities, these SoCs are designed to power the next generation of intelligent and connected vehicles.

Global Software-Defined Vehicles Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Application, Vehicle Type, Propulsion Type, Level of Autonomy, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it

also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Application:

ADAS & Safety

Connected Vehicle Services

Autonomous Driving

Body Control & Comfort System

Powertrain System

By Vehicle Type:

Passenger Car

Commercial Vehicles

By Propulsion Type:

ICE Vehicles

Electric Vehicles

By Level Of Autonomy:

Level 1

Level 2

Level 3

Level 4

Level 5

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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