

Global ADAS-Cockpit SoC Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global ADAS-Cockpit SoC market size is expected to reach \$ 1015 million by 2032, rising at a market growth of 19.3% CAGR during the forecast period (2026-2032).

ADAS-Cockpit SoC is the core One Chip solution that enables true ADAS-cockpit integration, referring to a highly integrated automotive-grade computing chip that runs both intelligent driving domain and intelligent cockpit domain tasks on a single system-on-chip, realizing full connectivity of hardware computing power and software resources. It solves the problems of low computing power utilization of intelligent driving chips, high cockpit GPU load, redundant waste, and high hardware and heat dissipation costs in the dual-chip separate architecture, greatly reducing controller space, component usage, and vehicle cost, serving as a key carrier to promote the upgrading of the vehicle electronic and electrical architecture from domain centralized to central computing architecture. At present, the intelligent driving domain and cockpit domain have achieved intra-domain integration under the domain centralized architecture; manufacturers such as Qualcomm, Horizon Robotics, and Black Sesame Technologies continue to promote the R&D and mass production of ADAS-Cockpit SoC, with Horizon Robotics' XingKong chip scheduled for mass production in the third quarter of 2026. The 2026 Beijing Auto Show has set up a special exhibition area for ADAS-cockpit integration and displayed a number of relevant achievements. Although ADAS-Cockpit SoC faces multiple challenges including chip design, system compatibility, functional safety isolation, heat dissipation, and engineering implementation, and will bring changes to industrial chain structure, R&D processes, and technology iteration, it has become a clear development direction of the industry and is gradually moving from concept to mass production and application. In 2025, global ADAS-Cockpit SoC production reached approximately 1.72 million units with an average global market price of around US\$165 per unit.

As an architecture that fully integrates the intelligent cockpit and advanced driver assistance systems onto a single chip or central computing platform, the future development of ADAS-Cockpit SoC will profoundly impact enterprise cost structures and profitability. Given that profit margins in the automotive industry are at historical lows, cost reduction has become the primary demand for automakers; cabin-driving integration enables significant reductions in chip component space and vehicle costs through controller fusion, shared components, and computing power, thereby improving corporate financial performance. Major industry trends indicate that electronic electrical architectures are evolving from distributed to central computing models, requiring automakers to adjust internal organizational structures to adapt to new intelligent bases and prompting manufacturers such as NIO, XPeng, and Li Auto to advance the development of cabin-driving integrated central computing platforms. Meanwhile, AI-oriented cockpit SoCs will become the mainstream, with mainstream chip manufacturing processes advancing to 4nm and below, aiming to support the upgrade of edge models from 1B-1.5B to 7B-10B multimodal models. This technological iteration will meet the high-throughput and continuous AI computing tasks, helping enterprises establish a competitive advantage in the high-end intelligent field.

This report studies the global ADAS-Cockpit SoC production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for ADAS-Cockpit SoC and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of ADAS-Cockpit SoC that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global ADAS-Cockpit SoC total production and demand, 2021-2032, (Million Units)

Global ADAS-Cockpit SoC total production value, 2021-2032, (USD Million)

Global ADAS-Cockpit SoC production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global ADAS-Cockpit SoC consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: ADAS-Cockpit SoC domestic production, consumption, key domestic manufacturers and share

Global ADAS-Cockpit SoC production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global ADAS-Cockpit SoC production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global ADAS-Cockpit SoC production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global ADAS-Cockpit SoC market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Renesas Electronics, NVIDIA, Qualcomm, NXP, Shanghai Black Sesame Technologies, Beijing SemiDrive Technology, Hubei SiEngine Technology, Beijing Horizon Robotics, Rockchip Electronics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World ADAS-Cockpit SoC market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global ADAS-Cockpit SoC Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global ADAS-Cockpit SoC Market, Segmentation by Type:

Scalable SoC

Others

Global ADAS-Cockpit SoC Market, Segmentation by Process Node:

5nm ADAS-Cockpit SoC

7nm ADAS-Cockpit SoC

16nm ADAS-Cockpit SoC

28nm ADAS-Cockpit SoC

Global ADAS-Cockpit SoC Market, Segmentation by Power Consumption:

Low-power ADAS-Cockpit SoC

Medium-power ADAS-Cockpit SoC

High-power ADAS-Cockpit SoC

Global ADAS-Cockpit SoC Market, Segmentation by Application:

OEMs

Tier1

Companies Profiled:

Renesas Electronics

NVIDIA

Qualcomm

NXP

Shanghai Black Sesame Technologies

Beijing SemiDrive Technology

Hubei SiEngine Technology

Beijing Horizon Robotics

Rockchip Electronics

Key Questions Answered:

1. How big is the global ADAS-Cockpit SoC market?
2. What is the demand of the global ADAS-Cockpit SoC market?
3. What is the year over year growth of the global ADAS-Cockpit SoC market?
4. What is the production and production value of the global ADAS-Cockpit SoC market?
5. Who are the key producers in the global ADAS-Cockpit SoC market?
6. What are the growth factors driving the market demand?

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