

Global Automotive Connected Navigation Systems Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Connected Navigation Systems market size was valued at US\$ 5330 million in 2025 and is forecast to a readjusted size of US\$ 8740 million by 2032 with a CAGR of 7.0% during review period.

Automotive Connected Navigation Systems refer to OEM-grade, vehicle-integrated navigation solutions installed or enabled by automakers before vehicle delivery. They combine positioning, digital maps, route calculation, real-time traffic, turn-by-turn guidance, lane-level guidance, voice and visual instructions, EV routing, speed-limit and road-attribute information, OTA map updates, location services and increasingly AI-enabled mobility assistance. The research object primarily covers embedded navigation applications, navigation SDKs, automotive map data, routing engines, online traffic and location services, navigation software modules within IVI systems, and cockpit-integrated navigation solutions used across center displays, instrument clusters, HUDs and smart cockpit domain controllers.

Depending on scope and contractual model, software, map and service value per equipped vehicle is commonly assessed in a broad range of approximately USD 15?80, while full IVI hardware systems can carry a materially higher value; this report?s revenue model focuses on the navigation-related software, data, service and functional module layer rather than the full cockpit hardware bill of materials.

Automotive Connected Navigation Systems are evolving from conventional route-guidance tools into a vehicle-native mobility intelligence layer. Their value is increasingly defined by the ability to combine digital maps, real-time traffic, lane-level

guidance, EV routing, speed-limit data, driver preferences, voice interaction and cloud updates within the OEM cockpit environment. Unlike smartphone navigation applications, OEM-grade systems must be integrated into vehicle displays, instrument clusters, HUDs, AR-HUDs and cockpit domain controllers, while also meeting automotive requirements for reliability, compliance, updateability and brand-specific user experience. For this reason, the revenue scope of this report focuses on navigation-related software, map data, SDKs, online services and functional modules, rather than the full value of infotainment hardware or general-purpose mobile map applications.

The global supply structure is layered rather than concentrated in a single type of vendor. HERE, TomTom, Google, Mapbox, NNG, Telenav and Sygic represent the core map, software and navigation-platform segment; Panasonic Automotive, HARMAN, Garmin, DENSO TEN, Mitsubishi Electric Mobility and Alpine are more closely linked to IVI and cockpit integration; while Neusoft, NavInfo, AutoNavi and Baidu are increasingly important in China and in export programs led by Chinese automakers. The distinction between a broad supplier longlist and a core formal list is therefore necessary: many companies provide relevant technologies, but only a smaller subset has sufficiently clear evidence of OEM-grade navigation products, recurring automotive navigation revenue or system-level integration responsibility.

Demand growth is supported by the shift toward software-defined vehicles, higher smart cockpit penetration, EV route planning, Chinese vehicle exports, regulatory requirements for speed assistance, and the integration of generative AI into in-car experiences. Google's recent updates for Android Auto and cars with Google built-in, including Gemini and immersive navigation features, indicate that navigation is becoming a conversational, contextual and service-rich cockpit function. At the same time, TomTom's Automotive Navigation Application and Neusoft's OneCoreGo demonstrate how navigation is being packaged with SDKs, AR guidance, EV capabilities, payment, connected services and AI mobility assistance. These developments suggest that navigation suppliers will compete not only on map coverage, but also on integration speed, data freshness, compliance support and user-experience differentiation.

Regulation is also reshaping the market. The EU's requirement for Intelligent Speed Assistance in new vehicles strengthens the role of validated speed-limit data, road-attribute data and continuous map updates. This creates a bridge between traditional navigation, eHorizon, ADAS maps and cockpit guidance. Suppliers with strong data validation processes, cross-border map coverage, vehicle-grade SDKs and proven OEM delivery capability are likely to gain share, while suppliers limited to consumer

applications or local map services may face rising entry barriers in global OEM programs.

This report is a detailed and comprehensive analysis for global Automotive Connected Navigation Systems market. Both quantitative and qualitative analyses are presented by company, by region & country, by Product Layer and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive Connected Navigation Systems market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Automotive Connected Navigation Systems market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Automotive Connected Navigation Systems market size and forecasts, by Product Layer and by Application, in consumption value (\$ Million), 2021-2032

Global Automotive Connected Navigation Systems market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive Connected Navigation Systems

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive Connected Navigation Systems market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies

covered as a part of this study include Google LLC, HERE Technologies, TomTom N.V., Neusoft Corporation, AutoNavi Software, Baidu, Inc., NavInfo Co., Ltd., Mapbox, Inc., HARMAN International, Panasonic Automotive Systems, etc.

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

Market segmentation

Automotive Connected Navigation Systems market is split by Product Layer and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Product Layer and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Product Layer

Navigation Software / Application

Navigation SDK / Engine

Automotive Map Data & Services

Integrated IVI Navigation Module

Other

Market segment by Connectivity Mode

Embedded Offline-Capable Navigation

Connected Cloud Navigation

Hybrid Navigation

Other

Market segment by Functional Use Case

Standard Turn-by-Turn Navigation

Lane-Level / 3D Navigation

EV Routing & Charging Navigation

AR / HUD Navigation

Other

Market segment by Application

Passenger Cars

Commercial Vehicles

Market segment by players, this report covers

Google LLC

HERE Technologies

TomTom N.V.

Neusoft Corporation

AutoNavi Software

Baidu, Inc.

NavInfo Co., Ltd.

Mapbox, Inc.

HARMAN International

Panasonic Automotive Systems

Garmin Ltd.

NNG LLC

Telenav, Inc.

Continental

DENSO TEN Limited

Mitsubishi Electric Mobility

Bosch

Sygic a.s.

Desay SV

PATEO CONNECT+

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Automotive Connected Navigation Systems product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Automotive Connected Navigation Systems, with revenue, gross margin, and global market share of Automotive Connected Navigation Systems from 2021 to 2026.

Chapter 3, the Automotive Connected Navigation Systems competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Product Layer and by Application, with consumption value and growth rate by Product Layer, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Automotive Connected Navigation Systems market forecast, by regions, by Product Layer and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Automotive Connected Navigation Systems.

Chapter 13, to describe Automotive Connected Navigation Systems research findings and conclusion.

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