

Global Automotive Connected Navigation Systems Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Connected Navigation Systems market size is expected to reach \$ 8740 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

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 studies the global Automotive Connected Navigation Systems demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Connected Navigation Systems, 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 Automotive Connected Navigation Systems that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Connected Navigation Systems total market, 2021-2032, (USD Million)

Global Automotive Connected Navigation Systems total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Automotive Connected Navigation Systems total market, key domestic companies, and share, (USD Million)

Global Automotive Connected Navigation Systems revenue by player, revenue and market share 2021-2026, (USD Million)

Global Automotive Connected Navigation Systems total market by Product Layer, CAGR, 2021-2032, (USD Million)

Global Automotive Connected Navigation Systems total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Automotive Connected Navigation Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Product Layer, 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 Automotive Connected Navigation Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Connected Navigation Systems Market, Segmentation by Product Layer:

Navigation Software / Application

Navigation SDK / Engine

Automotive Map Data & Services

Integrated IVI Navigation Module

Other

Global Automotive Connected Navigation Systems Market, Segmentation by Connectivity Mode:

Embedded Offline-Capable Navigation

Connected Cloud Navigation

Hybrid Navigation

Other

Global Automotive Connected Navigation Systems Market, Segmentation by Functional Use Case:

Standard Turn-by-Turn Navigation

Lane-Level / 3D Navigation

EV Routing & Charging Navigation

AR / HUD Navigation

Other

Global Automotive Connected Navigation Systems Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

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+

Key Questions Answered

1. How big is the global Automotive Connected Navigation Systems market?
2. What is the demand of the global Automotive Connected Navigation Systems market?
3. What is the year over year growth of the global Automotive Connected Navigation Systems market?
4. What is the total value of the global Automotive Connected Navigation Systems market?
5. Who are the Major Players in the global Automotive Connected Navigation Systems market?
6. What are the growth factors driving the market demand?

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