

# Global Automotive Cybersecurity 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 Cybersecurity market size was valued at US\$ 3988 million in 2025 and is forecast to a readjusted size of US\$ 11188 million by 2032 with a CAGR of 15.0% during review period.

Automotive Cybersecurity refers to a set of technical measures, management processes, and engineering practices designed to protect vehicles, electronic and electrical architectures, in-vehicle networks, on-board software, cloud platforms, communication links, and user data from unauthorized access, tampering, interference, destruction, or abnormal control. It covers the full vehicle lifecycle, including R&D, production, operation, maintenance, and scrapping, and aims to ensure driving safety, functional reliability, data privacy, and compliance with regulations such as UN R155, UN R156, and ISO/SAE 21434. The automotive cybersecurity industry chain consists of upstream security chips and HSMs, midstream in-vehicle software, firewalls and cloud platforms, and downstream OEMs, Tier 1s and service providers. Hardware components cost roughly \$30-\$80 per unit, in-vehicle software \$50-\$150 per vehicle annually, cloud services \$20-\$50 per vehicle monthly, and compliance projects \$50,000-\$200,000.

### Market Drivers

### Mandatory Global Regulations

UN R155/R156, ISO/SAE 21434, GB 44495 and other standards require OEMs to establish CSMS and SUMS, implement intrusion detection, secure OTA and

vulnerability response. Non-compliant vehicles are banned from the market, directly boosting demand for security hardware, software and compliance services.

### SDV and Connected Vehicle Expansion

The shift to central computing and zone control architectures, combined with V2X, remote control and autonomous driving, has greatly expanded the attack surface. Vehicles have become open connected endpoints, forcing a full upgrade of in-vehicle and cloud security systems.

### Stricter Data Privacy Requirements

Growing regulations on in-vehicle data (location, behavior, video) mandate end-to-end encryption, access control and audit capabilities, driving strong demand for PKI, identity authentication and vehicle-cloud data security.

### High-Impact Cybersecurity Incidents

Frequent remote hijacking, OTA tampering and ransomware attacks have raised safety and reputational risks. Consumers and regulators increasingly prioritize security, pushing OEMs to increase R&D investment in cybersecurity.

### Industrial Maturity and Localization

Advances in security chips, HSM, IDS/IPS and automotive-grade security middleware, together with policy support for domestic substitution, have accelerated large-scale deployment of cost-effective security solutions.

### Market Challenges

#### High Automotive-Grade Barriers

Core technologies such as security chips, hardware cryptography, testing tools and basic security software remain dominated by international suppliers. Local solutions face gaps in stability, certification and compatibility.

#### Complex E/E Architecture Integration

Multi-domain controllers, numerous ECUs and mixed networks require security

solutions to balance real-time performance, low power consumption and safety. Building cross-domain, vehicle-cloud defense systems is difficult and costly.

### Fragmented Standards and High Compliance Costs

Regional regulations (EU, China, US) are not fully aligned, requiring repeated certifications. TARA, penetration testing and annual audits are complex and expensive, especially for small suppliers.

### Severe Shortage of Cross-Disciplinary Talent

The industry lacks professionals with combined expertise in automotive electronics, AUTOSAR, cybersecurity and regulatory compliance, limiting R&D and service delivery capacity.

### Evolving Cyber Threats

Attackers increasingly target OTA platforms, cloud backends, digital keys and charging infrastructure. Zero-day vulnerabilities, ransomware and supply chain attacks raise ongoing operational and response costs.

### Immature Business Models

Cybersecurity is often treated as an add-on feature with low direct willingness to pay. Subscription-based VSOC and threat intelligence services are not yet mainstream, leading to long investment cycles and pressure on margins.

This report is a detailed and comprehensive analysis for global Automotive Cybersecurity market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type 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 Cybersecurity market size and forecasts, in consumption value (\$ Million), 2021-2032

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

Global Automotive Cybersecurity market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Automotive Cybersecurity 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 Cybersecurity

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 Cybersecurity 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 ETAS, Cisco systems, Harman (TowerSec), SBD Automotive, BT Security, Intel Corporation, NXP Semiconductors, NTT, Trillium, Secunet AG, etc.

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

### Market segmentation

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

### Market segment by Type

Software Services

Hardware Services

Network and Cloud Services

Security Services and Frameworks

Market segment by Compliance & Regulatory Scope

UN R155 Vehicle Cybersecurity

UN R156 Software Update Security (SUMS)

ISO/SAE 21434 Engineering & Risk Management

Market segment by Application

Passenger Vehicles

Commercial Vehicles

Market segment by players, this report covers

ETAS

Cisco systems

Harman (TowerSec)

SBD Automotive

BT Security

Intel Corporation

NXP Semiconductors

NTT

Trillium

Secunet AG

Panasonic

DENSO

Karamba Security

Inchtek

AUTOCRYPT

VicOne

GuardKnox

Cybellum

Utimaco GmbH

Thales Group

Futurex

Upstream Security

TOPSEC

Elektrobit

VVDN Technologies

Embitel

Trustonic

NOVELIC

Cymotive

Sansec

Neusoft

Vector

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 Cybersecurity product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Automotive Cybersecurity 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 Type and by Application, with

consumption value and growth rate by Type, 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 Cybersecurity market forecast, by regions, by Type 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 Cybersecurity.

Chapter 13, to describe Automotive Cybersecurity research findings and conclusion.

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