

Automotive Cybersecurity Market Report by Security Type (Application Security, Wireless Network Security, Endpoint Security), Form (In-Vehicle, External Cloud Services), Vehicle Type (Passenger Car, Commercial Vehicle, Electric Vehicle), Application (ADAS and Safety, Body Control and Comfort, Infotainment, Telematics, Powertrain Systems, and Others), and Region 2024-2032

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Abstracts

The global automotive cybersecurity market size reached US\$ 3.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 14.2 Billion by 2032, exhibiting a growth rate (CAGR) of 17.68% during 2024-2032. The market is experiencing steady growth driven by increasing sales of passenger and commercial vehicles, the growing preferences of individuals for seamless connectivity and access to cloud-based services, and the escalating demand for vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) communications.

Automotive Cybersecurity Market Trends:

Increasing Connectivity of Vehicles

The rising shift towards connectivity due to several factors, including consumer demand for advanced infotainment, navigation, and telematics systems, and the development of autonomous and semi-autonomous vehicles represent one of the primary factors contributing to the market growth. In addition, the growing preferences of individuals for seamless connectivity, access to cloud-based services, and the ability to control their vehicles remotely through smartphone apps are positively influencing the market. These

features rely on extensive software systems, communication networks, and data exchanges, making vehicles more susceptible to cyber threats. Along with this, the introduction of autonomous and semi-autonomous vehicles introduces an entirely new dimension to automotive cybersecurity. These vehicles rely heavily on sensors, cameras, radar, lidar, and sophisticated software algorithms to navigate and make decisions. Moreover, the escalating demand for vehicle-to-vehicle (V2V) and vehicle-to-infrastructure (V2I) communications for achieving safer and more efficient transportation systems is facilitating the market growth. The interconnectivity of vehicles with each other and with roadside infrastructure creates additional attack vectors for cybercriminals, driving the need to protect the integrity and confidentiality of these communication channels.

Evolving Regulatory Landscape

The automotive industry is subject to evolving regulatory frameworks and standards related to cybersecurity. Governing authorities and regulatory bodies around the world are recognizing the need to ensure the safety and security of connected and autonomous vehicles. This evolving regulatory landscape is offering a favorable market outlook. ISO/SAE 21434 is a standard specifically developed for automotive cybersecurity. It provides guidelines and requirements for automotive manufacturers and suppliers to manage cybersecurity throughout the lifecycle of vehicles. Moreover, ISO/SAE 21434 encourages collaboration between automakers and their supply chain partners. It highlights the need for a coordinated approach to cybersecurity, where all stakeholders work together to achieve a common goal. In line with this, various countries and regions are developing their cybersecurity regulations for vehicles, supporting the market growth. Furthermore, Regulatory bodies are addressing the growing road safety concerns by requiring automakers to demonstrate their commitment to cybersecurity and ensuring they have mechanisms in place to respond to incidents.

Cyber Threat Landscape

The growing and evolving cyber threat landscape is creating a positive outlook for the market. Hactivist groups and nation-states are focusing on exploiting vulnerabilities in connected vehicles for political or espionage purposes. They are also looking to compromise vehicle systems for gathering sensitive information or disrupt transportation networks. In addition, rising incidences of ransomware attacks are supporting the growth of the market. These attacks can immobilize a vehicle or expose personal data, leading to financial losses and privacy violations. Apart from this, the introduction of new technologies like 5G connectivity and the Internet of Things (IoT) is leading to rising

cybersecurity attacks. Cybercriminals can exploit vulnerabilities in the supply chain, third-party software components, and even in-vehicle entertainment systems to gain access to critical vehicle systems. The escalating cyber threat landscape is increasing the need for robust automotive cybersecurity solutions. As a result, automakers and cybersecurity firms are making continuous investments in research and development (R&D) activities, threat intelligence, and security awareness training.

Automotive Cybersecurity Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on security type, form, vehicle type, and application.

Breakup by Security Type:

- Application Security
- Wireless Network Security
- Endpoint Security

Wireless network security accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the security type. This includes application security, wireless network security, and endpoint security. According to the report, wireless network security represented the largest segment.

Breakup by Form:

- In-Vehicle
- External Cloud Services

In-vehicle dominates the market

The report has provided a detailed breakup and analysis of the market based on the form. This includes in-vehicle and external cloud services. According to the report, in-vehicle accounts for the majority of the market share.

Breakup by Vehicle Type:

- Passenger Car

Commercial Vehicle
Electric Vehicle

Passenger car holds the largest share in the industry

A detailed breakup and analysis of the market based on the vehicle type have also been provided in the report. This includes passenger car, commercial vehicle, and electric vehicle. According to the report, passenger car accounted for the largest market share.

Breakup by Application:

ADAS and Safety
Body Control and Comfort
Infotainment
Telematics
Powertrain Systems
Others

Infotainment represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes ADAS and safety, body control and comfort, infotainment, telematics, powertrain systems, and others. According to the report, Infotainment represented the largest segment.

Breakup by Region:

North America
United States
Canada
Asia Pacific
China
Japan
India
South Korea
Australia
Indonesia
Others
Europe

Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

North America leads the market, accounting for the largest automotive cybersecurity market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Aptiv PLC
Capgemini SE
Continental AG
DENSO Corporation
GuardKnox
HARMAN International (Samsung Electronics Co. Ltd.)
Karamba Security Ltd.
NXP Semiconductors N.V.
Upstream Security Ltd.
Vector Informatik GmbH

Key Questions Answered in This Report:

Automotive Cybersecurity Market Report by Security Type (Application Security, Wireless Network Security, Endp...

How has the global automotive cybersecurity market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global automotive cybersecurity market?

What is the impact of each driver, restraint, and opportunity on the global automotive cybersecurity market?

What are the key regional markets?

Which countries represent the most attractive automotive cybersecurity market?

What is the breakup of the market based on the security type?

Which is the most attractive security type in the automotive cybersecurity market?

What is the breakup of the market based on the form?

Which is the most attractive form in the automotive cybersecurity market?

What is the breakup of the market based on the vehicle type?

Which is the most attractive vehicle type in the automotive cybersecurity market?

What is the breakup of the market based on the application?

Which is the most attractive application in the automotive cybersecurity market?

What is the competitive structure of the market?

Who are the key players/companies in the global automotive cybersecurity market?

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