

Automotive Software Market Report by Product (Application Software, Middleware, Operating System), Vehicle Type (ICE Passenger Vehicle, ICE Light Commercial Vehicle, ICE Heavy Commercial Vehicle, Battery Electric Vehicle, Hybrid Electric Vehicle, Plug-in Hybrid Electric Vehicle, Autonomous Vehicles), Application (Safety and Security, Infotainment and Instrument Cluster, Vehicle Connectivity, and Others), and Region 2024-2032

<https://marketpublishers.com/r/A26421ADD478EN.html>

Date: April 2024

Pages: 138

Price: US\$ 3,899.00 (Single User License)

ID: A26421ADD478EN

Abstracts

The global automotive software market size reached US\$ 20.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 77.0 Billion by 2032, exhibiting a growth rate (CAGR) of 15.7% during 2024-2032. The market is experiencing robust growth driven by rapid advancements in autonomous vehicles, increasing demand for electric vehicles (EVs), the implementation of stringent safety regulations, rising popularity of connected car technology, and the integration of artificial intelligence (AI) and machine learning (ML).

Automotive Software Market Analysis:

Market Growth and Size: The market is witnessing stable growth, driven by rapid technological advancements, evolving consumer preferences, and the growing emphasis on connected, electric, and autonomous vehicles.

Major Market Drivers: Key drivers influencing the market growth include the rising advancements in autonomous vehicle technology, increasing demand for electric vehicles (EVs), implementation of stringent safety regulations, the proliferation of connected car technology, and the integration of artificial intelligence (AI) and machine

learning (ML) in automotive systems.

Key Market Trends: The key market trends involve the ongoing shift towards integration of infotainment and advanced connectivity features in vehicles, to enhance the user experience and vehicle functionality. Additionally, the rising adoption of software-as-a-service (SaaS) models in the automotive sector, facilitating continuous updates and feature enhancements, is bolstering the market growth.

Geographical Trends: Asia Pacific leads the market due to the increasing investments in automotive technology and a large consumer base. Other regions are also showing significant growth, fueled by technological advancements and high consumer demand for vehicle safety and connectivity features.

Competitive Landscape: The market is characterized by the active involvement of key players who are engaged in strategic partnerships, research and development (R&D), and global expansion to strengthen their market position. Furthermore, increasing trend of acquisitions and collaborations with tech companies and startups to integrate innovative technologies and expand product offerings, are favoring the market growth.

Challenges and Opportunities: The market faces various challenges, such as the high cost of advanced software development, cybersecurity concerns, and the need for compliance with diverse global regulatory standards. However, the rising demand for autonomous driving technologies, the growing electric vehicle (EV) sector, and the potential for software solutions in vehicle connectivity and fleet management, are creating new opportunities for the market growth.

Automotive Software Market Trends:

Rapid advancements in autonomous vehicle technology

The evolution of autonomous vehicle technology is one of the major factors boosting the market growth. It relies on sophisticated software systems to operate vehicles without human intervention. In line with this, the widespread integration of algorithms in autonomous vehicle technology for machine learning (ML), real-time computing, and advanced sensor fusion to navigate vehicles safely and efficiently is favoring the market growth. Moreover, the rising processing capability of the software to perceive the environment and make split-second decisions in complex traffic situations is providing a thrust to the market growth. Along with this, the increasing investment and research in autonomous vehicles by leading automotive companies and tech giants, indicating a growing reliance on software solutions, is enhancing the market growth.

Rising demand for electric vehicles (EVs)

The increasing demand for electric vehicles (EVs) among the masses is providing a boost to the market growth. EVs require specific software for their operation, such as

battery management systems, electric motor control, and energy efficiency optimization. Moreover, the growing focus on reducing carbon emissions, prompting governments to offer incentives for EV adoption, is favoring the market growth. Besides this, the rising capability of automotive software to manage the vehicle's powertrain and provide crucial data regarding battery health, range, and energy consumption patterns is anticipated to drive the market growth. Additionally, the increasing need for constant updates and improvements in EV software to enhance performance and efficiency is creating a positive outlook for the market growth.

Increasing emphasis on vehicle safety and compliance

The implementation of various safety regulations and compliance standards that mandate advanced safety features in vehicles is creating a positive outlook for the market growth. In line with this, the increasing reliance on safety software solutions, including electronic stability control, automatic emergency braking, and lane-keeping assistance, is favoring the market growth. Besides this, the introduction of several safety standards, encouraging automotive manufacturers to incorporate more advanced safety features, is providing a considerable boost to the market growth. Along with this, the rising need for software updates to maintain compliance with evolving safety standards, leading to increasing adoption of automotive software, is fostering the market growth. Additionally, the heightened focus on safety among consumers, prompting manufacturers to invest in advanced software-driven safety systems, is supporting the market growth.

Growing popularity of connected car technology

The expansion of connected car technology that utilizes internet connectivity to access, send, and receive data, is one of the major factors propelling the market growth. In line with this, the rising capability of the technology to enable various functions, such as real-time traffic updates, remote diagnostics, and over-the-air (OTA) updates for vehicle software, is providing a considerable boost to the market growth. In addition to this, the increasing consumer expectation for a connected driving experience, where vehicles serve as mobile offices or entertainment centers, is anticipated to drive the market growth. Apart from this, the increasing utilization of connected car technology for fleet management and commercial vehicles, offering efficient route planning, vehicle tracking, and maintenance scheduling through sophisticated software platforms, is strengthening the market growth.

Widespread integration of artificial intelligence (AI) and machine learning (ML)

The incorporation of artificial intelligence (AI) and machine learning (ML) in automotive systems is one of the major drivers propelling the market growth. They enable features like predictive maintenance, facilitating the analysis of vehicle data to predict potential failures before they occur. Moreover, AI and ML enhance autonomous driving capabilities, as they allow vehicles to learn from vast amounts of data and improve decision-making processes over time. Besides this, the integration of AI in user interfaces and voice-controlled systems to improve the user experience, making it more interactive and intuitive, is boosting the market growth. Additionally, AI and ML are utilized to optimize manufacturing processes and supply chain management in the automotive industry, leading to more efficient production and distribution systems.

Automotive Software 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 product, vehicle type, and application.

Breakup by Product:

- Application Software
- Middleware
- Operating System

Application software accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes application software, middleware, and operating system. According to the report, application software represented the largest segment.

Breakup by Vehicle Type:

- ICE Passenger Vehicle
- ICE Light Commercial Vehicle
- ICE Heavy Commercial Vehicle
- Battery Electric Vehicle
- Hybrid Electric Vehicle
- Plug-in Hybrid Electric Vehicle
- Autonomous Vehicles

ICE passenger vehicle 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 ICE passenger vehicle, ICE light commercial vehicle, ICE heavy commercial vehicle, battery electric vehicle, hybrid electric vehicle, plug-in hybrid electric vehicle, and autonomous vehicles. According to the report, ICE passenger vehicle accounted for the largest market share.

Breakup by Application:

- Safety and Security
- Infotainment and Instrument Cluster
- Vehicle Connectivity
- Others

Safety and security represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes safety and security, infotainment and instrument cluster, vehicle connectivity, and others. According to the report, safety and security 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

Asia Pacific leads the market, accounting for the largest automotive software 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); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific 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:

Airbiquity Inc.
Autonet Mobile Inc.
BlackBerry Limited
Google LLC
Green Hills Software
KPIT Technologies Limited
Microsoft Corporation
MontaVista Software LLC
NVIDIA Corporation
NXP Semiconductors N.V.
Robert Bosch GmbH
Wind River Systems Inc. (Intel Corporation)

Key Questions Answered in This Report

1. What was the size of the global automotive software market in 2023?
2. What is the expected growth rate of the global automotive software market during

2024-2032?

3. What has been the impact of COVID-19 on the global automotive software market?
4. What are the key factors driving the global automotive software market?
5. What is the breakup of the global automotive software market based on the product?
6. What is the breakup of the global automotive software market based on the vehicle type?
7. What is the breakup of the global automotive software market based on the application?
8. What are the key regions in the global automotive software market?
9. Who are the key players/companies in the global automotive software market?

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