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Global Automotive AI Box Market Growth 2026-2032

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Abstracts

The global Automotive AI Box market size is predicted to grow from US$ 1212 million in 2025 to US$ 4143 million in 2032; it is expected to grow at a CAGR of 19.3% from 2026 to 2032.

An Automotive AI Box is an independently enclosed computing device installed in passenger vehicles, commercial vehicles, public transport vehicles, or special-purpose vehicles to execute artificial intelligence workloads locally. The system typically integrates a CPU, GPU or NPU, memory, storage, vehicle power management, thermal management, CAN, Automotive Ethernet, camera interfaces, and optional cellular or positioning modules. This study focuses on complete vehicle-side AI computing units supplied as deployable hardware systems and primarily covers Cockpit AI Boxes, Telematics And Fleet AI Boxes, Vision Safety And ADAS AI Boxes, and Autonomous Driving And Special-Vehicle AI Boxes. Their functions include on-device language and multimodal inference, driver and occupant monitoring, multi-camera video analytics, fleet data processing, sensor fusion, and autonomous or assisted vehicle operation. Automotive AI Boxes occupy the midstream position of the vehicle edge-computing industry chain, connecting upstream semiconductor, memory, communication, sensor, and electronic-component suppliers with downstream vehicle manufacturers, fleet operators, system integrators, public transport companies, and industrial vehicle users. Product value is determined by computing performance, automotive interfaces, environmental durability, software integration, vehicle qualification, model deployment efficiency, and lifecycle support.

Key Findings

Global Automotive AI Box shipments reached approximately 1.05 million units in 2025

Weighted FOB-equivalent manufacturer pricing averaged approximately US$1,180 per

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unit globally

Asia Pacific, led by China, was the principal demand and supply region

Market Trends

The Automotive AI Box market is evolving from specialised vehicle video-processing and fleet-management equipment toward a broader vehicle-side AI computing layer. Earlier products were mainly designed for driver monitoring, blind-spot detection, passenger counting, video surveillance, and telematics data processing. New platforms increasingly support multimodal models, AI agents, sensor fusion, autonomous operation, and cross-domain workloads. Product architecture is consequently shifting toward modular processors, larger memory configurations, higher-bandwidth vehicle networks, multiple camera inputs, secure OTA capabilities, and configurable edge-cloud operation. Rugged fanless products remain important for commercial fleets, mining, ports, buses, and heavy-duty equipment, while higher-performance systems are being developed for intelligent cockpits and software-defined vehicles. Official product portfolios from vehicle-computing suppliers show continued integration of automotive power management, CAN, Automotive Ethernet, GMSL or PoE cameras, GNSS, 4G or 5G connectivity, and dedicated AI acceleration within a single enclosure.

Market Dynamics

Drivers

Market development is supported by growing demand for low-latency local inference, reduced transmission of raw vehicle data, improved operation under weak or unavailable network conditions, and lower dependence on continuous cloud computing. Commercial fleets are adopting AI Boxes to upgrade existing camera and telematics systems without replacing all installed equipment, while vehicle manufacturers are using dedicated computing nodes to add new AI functions to established electrical and electronic architectures. Increasing requirements for driver monitoring, active safety, operational efficiency, autonomous industrial vehicles, and intelligent in-cabin interaction are broadening the addressable market beyond a single vehicle segment.

Restraints

High-performance processors, automotive memory, power conditioning, thermal management, rugged enclosures, camera interfaces, and vehicle qualification increase

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system cost, particularly for low-volume or customised projects. Integration also requires access to vehicle signals, network architecture, cybersecurity processes, and application software, which lengthens development cycles and limits the use of standardised off-the-shelf products in OEM programmes. Lower-compute fleet devices face hardware commoditisation and price pressure, while advanced systems may encounter uncertainty over customer willingness to pay for computing capacity that is not fully utilised at launch.

Opportunities

The largest incremental opportunities are associated with upgrading existing vehicle platforms, expanding intelligent functions in mid-range models, and deploying vehicle-side analytics in commercial and industrial fleets. Mining vehicles, port equipment, public transport, emergency vehicles, logistics fleets, agricultural machinery, and low-speed autonomous vehicles require rugged local computing but often lack the production scale needed for a dedicated domain-controller design. Modular Automotive AI Boxes can address these markets through configurable processors, communication modules, camera inputs, and application software. Additional value may be created through model optimisation, algorithm licensing, remote device management, OTA maintenance, and edge-cloud service contracts rather than relying solely on hardware sales.

Challenges

The principal long-term challenge is the migration of vehicle architecture toward more powerful domain controllers and central computing platforms. Functions currently performed by an independent Automotive AI Box may eventually be integrated into cockpit, autonomous-driving, or cross-domain controllers in newly designed vehicles. Suppliers must therefore demonstrate that an independent unit provides faster deployment, workload isolation, platform reuse, retrofit capability, or lower total development cost. Vehicle cybersecurity and software-update governance also raise barriers to entry because connected computing devices must be integrated into the manufacturer's cybersecurity management and software-update processes under applicable vehicle regulations.

Industry Chain Analysis

The upstream Automotive AI Box industry chain consists of AI processors, automotive CPUs and MCUs, memory, storage, cellular and GNSS modules, power-management devices, connectors, cameras, thermal components, and rugged enclosure materials.

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Processor and memory configurations account for a substantial portion of the bill of materials in high-performance systems, while communication modules, camera interfaces, power protection, and mechanical design become more important in fleet and industrial vehicle applications. Availability of long-lifecycle components and stable software support is critical because automotive and transport customers generally require longer supply periods than consumer electronics markets.

Midstream suppliers include automotive Tier 1 companies, vehicle-computing manufacturers, telematics terminal suppliers, AI software developers, and system integrators. Their responsibilities cover hardware architecture, PCB and enclosure design, vehicle power adaptation, operating systems, drivers, model deployment, algorithms, cybersecurity, environmental qualification, and application integration. Downstream customers include passenger-vehicle OEMs, commercial-vehicle manufacturers, fleet operators, public transport agencies, autonomous-driving developers, and industrial vehicle operators. Hardware-only assembly offers limited differentiation, while stronger value capture is generated by vehicle qualification, full-stack software, model adaptation, custom engineering, long-term maintenance, and direct access to OEM or fleet customers. Automotive-certified and rugged in-vehicle products demonstrate that qualification, connectivity, environmental durability, and software integration are major sources of product differentiation.

Segment Insights

By primary function, Telematics And Fleet AI Boxes and Vision Safety And ADAS AI Boxes form the more established shipment base because commercial fleets and public transport systems have deployed local video analytics and vehicle-data processing for several product generations. Automotive Cockpit AI Boxes constitute an emerging higher-growth segment driven by on-device large models and multimodal interaction. Autonomous Driving And Special-Vehicle AI Boxes generally have lower volumes but higher average unit values because they require stronger processors, multi-sensor interfaces, large storage capacity, and rugged environmental design.

Lower-compute systems remain prevalent in basic fleet analytics, driver monitoring, and telematics applications. Products with higher AI performance are concentrated in multi-camera analytics, intelligent cockpit, sensor-fusion, and autonomous-operation workloads. OEM-installed systems typically require deeper vehicle integration and qualification, while fleet retrofit products emphasise compatibility with existing cameras, displays, wiring, and telematics infrastructure. Full-stack AI appliances can command higher value than barebone computers because the selling proposition includes

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algorithms, middleware, device management, and deployment support.

Downstream Market Opportunities

Passenger-vehicle OEMs provide the principal opportunity for cockpit and cross-domain AI Boxes, particularly where a dedicated computing unit can add new AI capability without redesigning an established cockpit platform. Commercial fleets offer a broader near-term installation base for driver monitoring, video analytics, fuel and route optimisation, safety-event detection, and predictive maintenance. Public transport, mining, ports, logistics, agriculture, and emergency services are attractive specialised markets because their vehicles operate in demanding environments and require real-time local decisions. Retrofit and system-integrator channels are particularly relevant in these applications, while passenger-vehicle programmes are more dependent on direct OEM and Tier 1 relationships.

Regional Insights

Asia Pacific is the largest demand and supply region, led by China’s automotive electronics ecosystem, rapid vehicle-platform iteration, extensive commercial-vehicle market, and growing deployment of intelligent cockpit and edge AI solutions. China combines processor-platform development, vehicle electronics manufacturing, AI software, model deployment, and OEM integration, allowing suppliers to shorten the transition from prototype to vehicle programme. Japan and South Korea have strong automotive semiconductor and OEM capabilities but generally follow more structured qualification and platform-integration cycles.

North America and Europe maintain important positions in rugged vehicle computing, autonomous-driving development, fleet management, and high-value transport applications. European suppliers place greater emphasis on automotive certification, cybersecurity, functional integration, and compliance, while North American demand is supported by logistics fleets, industrial vehicles, autonomous systems, and specialised mobility applications. Regional supply-chain security, data governance, vehicle cybersecurity, and restrictions affecting connected-vehicle hardware and software are likely to encourage more localised product configurations and supplier relationships.

Competitive Landscape Analysis

The Automotive AI Box market has a fragmented competitive structure because it combines several previously separate product categories. Automotive Tier 1 and full-

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stack vehicle-computing suppliers compete through OEM integration, vehicle architecture knowledge, automotive qualification, and long-term programme support. Rugged edge-computing manufacturers compete through flexible hardware configurations, environmental durability, multi-camera connectivity, vehicle power management, and rapid customisation for fleets and special-purpose vehicles. Telematics and vision-equipment suppliers use installed customer channels and application algorithms to provide lower-cost intelligent upgrades, while operating-system and model companies increasingly participate through joint hardware-software solutions. Competition is therefore moving from individual hardware specifications toward complete deployment capability, including processors, memory, AI frameworks, algorithms, cybersecurity, OTA management, and lifecycle services. No single supplier category has a uniform advantage across cockpit, fleet, vision, autonomous-driving, and special-vehicle applications.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Automotive AI Box Industry Forecast” looks at past sales and reviews total world Automotive AI Box sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive AI Box sales for 2026 through 2032. With Automotive AI Box sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive AI Box industry.

This Insight Report provides a comprehensive analysis of the global Automotive AI Box landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive AI Box portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Automotive AI Box market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive AI Box and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive AI Box.

This report presents a comprehensive overview, market shares, and growth

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opportunities of Automotive AI Box market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Cockpit AI Box

Telematics and Fleet AI Box

Vision Safety and ADAS AI Box

Autonomous Driving and Special-Vehicle AI Box

Segmentation by AI Compute Performance:

Below 25 TOPS

25 To Below 100 TOPS

100 To Below 200 TOPS

200 TOPS and Above

Segmentation by Installation Channel:

OEM-Fitted AI Boxes

Aftermarket AI Boxes

Segmentation by Application:

Passenger Cars

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Commercial Vehicles

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Kontron AG

Stereolabs Inc.

Premio Inc.

Eurotech S.p.A.

Vecow Co., Ltd.

Lanner Electronics Inc.

Cincoze Co., Ltd.

Desay SV Automotive Co., Ltd.

Huizhou Foryou General Electronics Co., Ltd.

ThunderSoft Co., Ltd.

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Wuxi Auto-Link Intelligent Technology Co., Ltd.

PATEO CONNECT+ Technology Shanghai Corporation

BICV Technology Co., Ltd.

MeiG Smart Technology Co., Ltd.

Lenovo Group Limited

ArcherMind Technology Nanjing Co., Ltd.

Neusoft Corporation

ThunderX Auto Technology Co., Ltd.

Banma Intelligence

DONGFENG

ModelBest

TWOWIN Information Technology Shenzhen Co., Ltd.

STONKAM

Advantech

AAEON

ADLINK Technology Inc.

ARBOR Technology Corp.

Axiomtek Co., Ltd.

Neousys Technology Inc.

NEXCOM International Co., Ltd.

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Suzhou Youkong Zhixing Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive AI Box market?

What factors are driving Automotive AI Box market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive AI Box market opportunities vary by end market size?

How does Automotive AI Box break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Automotive AI Box Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Automotive AI Box by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Automotive AI Box by Country/Region, 2021, 2025 & 2032
2.2 Automotive AI Box Segment by Type
  2.2.1 Cockpit AI Box
  2.2.2 Telematics and Fleet AI Box
  2.2.3 Vision Safety and ADAS AI Box
  2.2.4 Autonomous Driving and Special-Vehicle AI Box
  2.2.5 Automotive AI Box Sales by Type
    2.2.5.1 Global Automotive AI Box Sales Market Share by Type (2021-2026)
    2.2.5.2 Global Automotive AI Box Revenue and Market Share by Type (2021-2026)
    2.2.5.3 Global Automotive AI Box Sale Price by Type (2021-2026)
2.3 Automotive AI Box Segment by AI Compute Performance
  2.3.1 Below 25 TOPS
  2.3.2 25 To Below 100 TOPS
  2.3.3 100 To Below 200 TOPS
  2.3.4 200 TOPS and Above
  2.3.5 Automotive AI Box Sales by AI Compute Performance
    2.3.5.1 Global Automotive AI Box Sales Market Share by AI Compute Performance (2021-2026)
    2.3.5.2 Global Automotive AI Box Revenue and Market Share by AI Compute

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Performance (2021-2026)
2.3.5.3 Global Automotive AI Box Sale Price by AI Compute Performance (2021-2026)
2.4 Automotive AI Box Segment by Installation Channel
2.4.1 OEM-Fitted AI Boxes
2.4.2 Aftermarket AI Boxes
2.4.3 Automotive AI Box Sales by Installation Channel
2.4.3.1 Global Automotive AI Box Sales Market Share by Installation Channel (2021-2026)
2.4.3.2 Global Automotive AI Box Revenue and Market Share by Installation Channel (2021-2026)
2.4.3.3 Global Automotive AI Box Sale Price by Installation Channel (2021-2026)
2.5 Automotive AI Box Segment by Application
2.5.1 Passenger Cars
2.5.2 Commercial Vehicles
2.5.3 Automotive AI Box Sales by Application
2.5.3.1 Global Automotive AI Box Sale Market Share by Application (2021-2026)
2.5.3.2 Global Automotive AI Box Revenue and Market Share by Application (2021-2026)
2.5.3.3 Global Automotive AI Box Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive AI Box Breakdown Data by Company
3.1.1 Global Automotive AI Box Annual Sales by Company (2021-2026)
3.1.2 Global Automotive AI Box Sales Market Share by Company (2021-2026)
3.2 Global Automotive AI Box Annual Revenue by Company (2021-2026)
3.2.1 Global Automotive AI Box Revenue by Company (2021-2026)
3.2.2 Global Automotive AI Box Revenue Market Share by Company (2021-2026)
3.3 Global Automotive AI Box Sale Price by Company
3.4 Key Manufacturers Automotive AI Box Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Automotive AI Box Product Location Distribution
3.4.2 Players Automotive AI Box Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

+357 96 030922
info@marketpublishers.com

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE AI BOX BY GEOGRAPHIC REGION

4.1 World Historic Automotive AI Box Market Size by Geographic Region (2021-2026)
4.1.1 Global Automotive AI Box Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Automotive AI Box Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Automotive AI Box Market Size by Country/Region (2021-2026)
4.2.1 Global Automotive AI Box Annual Sales by Country/Region (2021-2026)
4.2.2 Global Automotive AI Box Annual Revenue by Country/Region (2021-2026)
4.3 Americas Automotive AI Box Sales Growth
4.4 APAC Automotive AI Box Sales Growth
4.5 Europe Automotive AI Box Sales Growth
4.6 Middle East & Africa Automotive AI Box Sales Growth

5 AMERICAS

5.1 Americas Automotive AI Box Sales by Country
5.1.1 Americas Automotive AI Box Sales by Country (2021-2026)
5.1.2 Americas Automotive AI Box Revenue by Country (2021-2026)
5.2 Americas Automotive AI Box Sales by Type (2021-2026)
5.3 Americas Automotive AI Box Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Automotive AI Box Sales by Region
6.1.1 APAC Automotive AI Box Sales by Region (2021-2026)
6.1.2 APAC Automotive AI Box Revenue by Region (2021-2026)
6.2 APAC Automotive AI Box Sales by Type (2021-2026)
6.3 APAC Automotive AI Box Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India

+357 96 030922
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6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive AI Box by Country
  7.1.1 Europe Automotive AI Box Sales by Country (2021-2026)
  7.1.2 Europe Automotive AI Box Revenue by Country (2021-2026)
7.2 Europe Automotive AI Box Sales by Type (2021-2026)
7.3 Europe Automotive AI Box Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive AI Box by Country
  8.1.1 Middle East & Africa Automotive AI Box Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Automotive AI Box Revenue by Country (2021-2026)
8.2 Middle East & Africa Automotive AI Box Sales by Type (2021-2026)
8.3 Middle East & Africa Automotive AI Box Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Automotive AI Box

+357 96 030922
info@marketpublishers.com

10.3 Manufacturing Process Analysis of Automotive AI Box
10.4 Industry Chain Structure of Automotive AI Box

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Automotive AI Box Distributors
11.3 Automotive AI Box Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE AI BOX BY GEOGRAPHIC REGION

12.1 Global Automotive AI Box Market Size Forecast by Region
  12.1.1 Global Automotive AI Box Forecast by Region (2027-2032)
  12.1.2 Global Automotive AI Box Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Automotive AI Box Forecast by Type (2027-2032)
12.7 Global Automotive AI Box Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Kontron AG
  13.1.1 Kontron AG Company Information
  13.1.2 Kontron AG Automotive AI Box Product Portfolios and Specifications
  13.1.3 Kontron AG Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 Kontron AG Main Business Overview
  13.1.5 Kontron AG Latest Developments
13.2 Stereolabs Inc.
  13.2.1 Stereolabs Inc. Company Information
  13.2.2 Stereolabs Inc. Automotive AI Box Product Portfolios and Specifications
  13.2.3 Stereolabs Inc. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
  13.2.4 Stereolabs Inc. Main Business Overview

+357 96 030922
info@marketpublishers.com

13.2.5 Stereolabs Inc. Latest Developments
13.3 Premio Inc.
13.3.1 Premio Inc. Company Information
13.3.2 Premio Inc. Automotive AI Box Product Portfolios and Specifications
13.3.3 Premio Inc. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Premio Inc. Main Business Overview
13.3.5 Premio Inc. Latest Developments
13.4 Eurotech S.p.A.
13.4.1 Eurotech S.p.A. Company Information
13.4.2 Eurotech S.p.A. Automotive AI Box Product Portfolios and Specifications
13.4.3 Eurotech S.p.A. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Eurotech S.p.A. Main Business Overview
13.4.5 Eurotech S.p.A. Latest Developments
13.5 Vecow Co., Ltd.
13.5.1 Vecow Co., Ltd. Company Information
13.5.2 Vecow Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.5.3 Vecow Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Vecow Co., Ltd. Main Business Overview
13.5.5 Vecow Co., Ltd. Latest Developments
13.6 Lanner Electronics Inc.
13.6.1 Lanner Electronics Inc. Company Information
13.6.2 Lanner Electronics Inc. Automotive AI Box Product Portfolios and Specifications
13.6.3 Lanner Electronics Inc. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Lanner Electronics Inc. Main Business Overview
13.6.5 Lanner Electronics Inc. Latest Developments
13.7 Cincoze Co., Ltd.
13.7.1 Cincoze Co., Ltd. Company Information
13.7.2 Cincoze Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.7.3 Cincoze Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Cincoze Co., Ltd. Main Business Overview
13.7.5 Cincoze Co., Ltd. Latest Developments
13.8 Desay SV Automotive Co., Ltd.
13.8.1 Desay SV Automotive Co., Ltd. Company Information
13.8.2 Desay SV Automotive Co., Ltd. Automotive AI Box Product Portfolios and

+357 96 030922
info@marketpublishers.com

Specifications
13.8.3 Desay SV Automotive Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Desay SV Automotive Co., Ltd. Main Business Overview
13.8.5 Desay SV Automotive Co., Ltd. Latest Developments
13.9 Huizhou Foryou General Electronics Co., Ltd.
13.9.1 Huizhou Foryou General Electronics Co., Ltd. Company Information
13.9.2 Huizhou Foryou General Electronics Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.9.3 Huizhou Foryou General Electronics Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Huizhou Foryou General Electronics Co., Ltd. Main Business Overview
13.9.5 Huizhou Foryou General Electronics Co., Ltd. Latest Developments
13.10 ThunderSoft Co., Ltd.
13.10.1 ThunderSoft Co., Ltd. Company Information
13.10.2 ThunderSoft Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.10.3 ThunderSoft Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 ThunderSoft Co., Ltd. Main Business Overview
13.10.5 ThunderSoft Co., Ltd. Latest Developments
13.11 Wuxi Auto-Link Intelligent Technology Co., Ltd.
13.11.1 Wuxi Auto-Link Intelligent Technology Co., Ltd. Company Information
13.11.2 Wuxi Auto-Link Intelligent Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.11.3 Wuxi Auto-Link Intelligent Technology Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Wuxi Auto-Link Intelligent Technology Co., Ltd. Main Business Overview
13.11.5 Wuxi Auto-Link Intelligent Technology Co., Ltd. Latest Developments
13.12 PATEO CONNECT+ Technology Shanghai Corporation
13.12.1 PATEO CONNECT+ Technology Shanghai Corporation Company Information
13.12.2 PATEO CONNECT+ Technology Shanghai Corporation Automotive AI Box Product Portfolios and Specifications
13.12.3 PATEO CONNECT+ Technology Shanghai Corporation Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 PATEO CONNECT+ Technology Shanghai Corporation Main Business Overview
13.12.5 PATEO CONNECT+ Technology Shanghai Corporation Latest Developments
13.13 BICV Technology Co., Ltd.
13.13.1 BICV Technology Co., Ltd. Company Information

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13.13.2 BICV Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.13.3 BICV Technology Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 BICV Technology Co., Ltd. Main Business Overview
13.13.5 BICV Technology Co., Ltd. Latest Developments
13.14 MeiG Smart Technology Co., Ltd.
13.14.1 MeiG Smart Technology Co., Ltd. Company Information
13.14.2 MeiG Smart Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.14.3 MeiG Smart Technology Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 MeiG Smart Technology Co., Ltd. Main Business Overview
13.14.5 MeiG Smart Technology Co., Ltd. Latest Developments
13.15 Lenovo Group Limited
13.15.1 Lenovo Group Limited Company Information
13.15.2 Lenovo Group Limited Automotive AI Box Product Portfolios and Specifications
13.15.3 Lenovo Group Limited Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Lenovo Group Limited Main Business Overview
13.15.5 Lenovo Group Limited Latest Developments
13.16 ArcherMind Technology Nanjing Co., Ltd.
13.16.1 ArcherMind Technology Nanjing Co., Ltd. Company Information
13.16.2 ArcherMind Technology Nanjing Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.16.3 ArcherMind Technology Nanjing Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 ArcherMind Technology Nanjing Co., Ltd. Main Business Overview
13.16.5 ArcherMind Technology Nanjing Co., Ltd. Latest Developments
13.17 Neusoft Corporation
13.17.1 Neusoft Corporation Company Information
13.17.2 Neusoft Corporation Automotive AI Box Product Portfolios and Specifications
13.17.3 Neusoft Corporation Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Neusoft Corporation Main Business Overview
13.17.5 Neusoft Corporation Latest Developments
13.18 ThunderX Auto Technology Co., Ltd.
13.18.1 ThunderX Auto Technology Co., Ltd. Company Information

+357 96 030922
info@marketpublishers.com

13.18.2 ThunderX Auto Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.18.3 ThunderX Auto Technology Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 ThunderX Auto Technology Co., Ltd. Main Business Overview
13.18.5 ThunderX Auto Technology Co., Ltd. Latest Developments
13.19 Banma Intelligence
13.19.1 Banma Intelligence Company Information
13.19.2 Banma Intelligence Automotive AI Box Product Portfolios and Specifications
13.19.3 Banma Intelligence Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Banma Intelligence Main Business Overview
13.19.5 Banma Intelligence Latest Developments
13.20 DONGFENG
13.20.1 DONGFENG Company Information
13.20.2 DONGFENG Automotive AI Box Product Portfolios and Specifications
13.20.3 DONGFENG Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 DONGFENG Main Business Overview
13.20.5 DONGFENG Latest Developments
13.21 ModelBest
13.21.1 ModelBest Company Information
13.21.2 ModelBest Automotive AI Box Product Portfolios and Specifications
13.21.3 ModelBest Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 ModelBest Main Business Overview
13.21.5 ModelBest Latest Developments
13.22 TWOWIN Information Technology Shenzhen Co., Ltd.
13.22.1 TWOWIN Information Technology Shenzhen Co., Ltd. Company Information
13.22.2 TWOWIN Information Technology Shenzhen Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.22.3 TWOWIN Information Technology Shenzhen Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 TWOWIN Information Technology Shenzhen Co., Ltd. Main Business Overview
13.22.5 TWOWIN Information Technology Shenzhen Co., Ltd. Latest Developments
13.23 STONKAM
13.23.1 STONKAM Company Information
13.23.2 STONKAM Automotive AI Box Product Portfolios and Specifications

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13.23.3 STONKAM Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 STONKAM Main Business Overview
13.23.5 STONKAM Latest Developments
13.24 Advantech
13.24.1 Advantech Company Information
13.24.2 Advantech Automotive AI Box Product Portfolios and Specifications
13.24.3 Advantech Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 Advantech Main Business Overview
13.24.5 Advantech Latest Developments
13.25 AAEON
13.25.1 AAEON Company Information
13.25.2 AAEON Automotive AI Box Product Portfolios and Specifications
13.25.3 AAEON Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 AAEON Main Business Overview
13.25.5 AAEON Latest Developments
13.26 ADLINK Technology Inc.
13.26.1 ADLINK Technology Inc. Company Information
13.26.2 ADLINK Technology Inc. Automotive AI Box Product Portfolios and Specifications
13.26.3 ADLINK Technology Inc. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 ADLINK Technology Inc. Main Business Overview
13.26.5 ADLINK Technology Inc. Latest Developments
13.27 ARBOR Technology Corp.
13.27.1 ARBOR Technology Corp. Company Information
13.27.2 ARBOR Technology Corp. Automotive AI Box Product Portfolios and Specifications
13.27.3 ARBOR Technology Corp. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.27.4 ARBOR Technology Corp. Main Business Overview
13.27.5 ARBOR Technology Corp. Latest Developments
13.28 Axiomtek Co., Ltd.
13.28.1 Axiomtek Co., Ltd. Company Information
13.28.2 Axiomtek Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.28.3 Axiomtek Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)

+357 96 030922
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13.28.4 Axiomtek Co., Ltd. Main Business Overview
13.28.5 Axiomtek Co., Ltd. Latest Developments
13.29 Neousys Technology Inc.
13.29.1 Neousys Technology Inc. Company Information
13.29.2 Neousys Technology Inc. Automotive AI Box Product Portfolios and Specifications
13.29.3 Neousys Technology Inc. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.29.4 Neousys Technology Inc. Main Business Overview
13.29.5 Neousys Technology Inc. Latest Developments
13.30 NEXCOM International Co., Ltd.
13.30.1 NEXCOM International Co., Ltd. Company Information
13.30.2 NEXCOM International Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.30.3 NEXCOM International Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.30.4 NEXCOM International Co., Ltd. Main Business Overview
13.30.5 NEXCOM International Co., Ltd. Latest Developments
13.31 Suzhou Youkong Zhixing Technology Co., Ltd.
13.31.1 Suzhou Youkong Zhixing Technology Co., Ltd. Company Information
13.31.2 Suzhou Youkong Zhixing Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
13.31.3 Suzhou Youkong Zhixing Technology Co., Ltd. Automotive AI Box Sales, Revenue, Price and Gross Margin (2021-2026)
13.31.4 Suzhou Youkong Zhixing Technology Co., Ltd. Main Business Overview
13.31.5 Suzhou Youkong Zhixing Technology Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. Automotive AI Box Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Automotive AI Box Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Cockpit AI Box
Table 4. Major Players of Telematics and Fleet AI Box
Table 5. Major Players of Vision Safety and ADAS AI Box
Table 6. Major Players of Autonomous Driving and Special-Vehicle AI Box
Table 7. Global Automotive AI Box Sales by Type (2021-2026) & (K Units)
Table 8. Global Automotive AI Box Sales Market Share by Type (2021-2026)
Table 9. Global Automotive AI Box Revenue by Type (2021-2026) & ($ million)
Table 10. Global Automotive AI Box Revenue Market Share by Type (2021-2026)
Table 11. Global Automotive AI Box Sale Price by Type (2021-2026) & (US$/Unit)
Table 12. Major Players of Below 25 TOPS
Table 13. Major Players of 25 To Below 100 TOPS
Table 14. Major Players of 100 To Below 200 TOPS
Table 15. Major Players of 200 TOPS and Above
Table 16. Global Automotive AI Box Sales by AI Compute Performance (2021-2026) & (K Units)
Table 17. Global Automotive AI Box Sales Market Share by AI Compute Performance (2021-2026)
Table 18. Global Automotive AI Box Revenue by AI Compute Performance (2021-2026) & ($ million)
Table 19. Global Automotive AI Box Revenue Market Share by AI Compute Performance (2021-2026)
Table 20. Global Automotive AI Box Sale Price by AI Compute Performance (2021-2026) & (US$/Unit)
Table 21. Major Players of OEM-Fitted AI Boxes
Table 22. Major Players of Aftermarket AI Boxes
Table 23. Global Automotive AI Box Sales by Installation Channel (2021-2026) & (K Units)
Table 24. Global Automotive AI Box Sales Market Share by Installation Channel (2021-2026)
Table 25. Global Automotive AI Box Revenue by Installation Channel (2021-2026) & ($ million)

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Table 26. Global Automotive AI Box Revenue Market Share by Installation Channel (2021-2026)
Table 27. Global Automotive AI Box Sale Price by Installation Channel (2021-2026) & (US$/Unit)
Table 28. Global Automotive AI Box Sale by Application (2021-2026) & (K Units)
Table 29. Global Automotive AI Box Sale Market Share by Application (2021-2026)
Table 30. Global Automotive AI Box Revenue by Application (2021-2026) & ($ million)
Table 31. Global Automotive AI Box Revenue Market Share by Application (2021-2026)
Table 32. Global Automotive AI Box Sale Price by Application (2021-2026) & (US$/Unit)
Table 33. Global Automotive AI Box Sales by Company (2021-2026) & (K Units)
Table 34. Global Automotive AI Box Sales Market Share by Company (2021-2026)
Table 35. Global Automotive AI Box Revenue by Company (2021-2026) & ($ millions)
Table 36. Global Automotive AI Box Revenue Market Share by Company (2021-2026)
Table 37. Global Automotive AI Box Sale Price by Company (2021-2026) & (US$/Unit)
Table 38. Key Manufacturers Automotive AI Box Producing Area Distribution and Sales Area
Table 39. Players Automotive AI Box Products Offered
Table 40. Automotive AI Box Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 41. New Products and Potential Entrants
Table 42. Market M&A Activity & Strategy
Table 43. Global Automotive AI Box Sales by Geographic Region (2021-2026) & (K Units)
Table 44. Global Automotive AI Box Sales Market Share Geographic Region (2021-2026)
Table 45. Global Automotive AI Box Revenue by Geographic Region (2021-2026) & ($ millions)
Table 46. Global Automotive AI Box Revenue Market Share by Geographic Region (2021-2026)
Table 47. Global Automotive AI Box Sales by Country/Region (2021-2026) & (K Units)
Table 48. Global Automotive AI Box Sales Market Share by Country/Region (2021-2026)
Table 49. Global Automotive AI Box Revenue by Country/Region (2021-2026) & ($ millions)
Table 50. Global Automotive AI Box Revenue Market Share by Country/Region (2021-2026)
Table 51. Americas Automotive AI Box Sales by Country (2021-2026) & (K Units)
Table 52. Americas Automotive AI Box Sales Market Share by Country (2021-2026)
Table 53. Americas Automotive AI Box Revenue by Country (2021-2026) & ($ millions)
Table 54. Americas Automotive AI Box Sales by Type (2021-2026) & (K Units)

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Table 55. Americas Automotive AI Box Sales by Application (2021-2026) & (K Units)
Table 56. APAC Automotive AI Box Sales by Region (2021-2026) & (K Units)
Table 57. APAC Automotive AI Box Sales Market Share by Region (2021-2026)
Table 58. APAC Automotive AI Box Revenue by Region (2021-2026) & ($ millions)
Table 59. APAC Automotive AI Box Sales by Type (2021-2026) & (K Units)
Table 60. APAC Automotive AI Box Sales by Application (2021-2026) & (K Units)
Table 61. Europe Automotive AI Box Sales by Country (2021-2026) & (K Units)
Table 62. Europe Automotive AI Box Revenue by Country (2021-2026) & ($ millions)
Table 63. Europe Automotive AI Box Sales by Type (2021-2026) & (K Units)
Table 64. Europe Automotive AI Box Sales by Application (2021-2026) & (K Units)
Table 65. Middle East & Africa Automotive AI Box Sales by Country (2021-2026) & (K Units)
Table 66. Middle East & Africa Automotive AI Box Revenue Market Share by Country (2021-2026)
Table 67. Middle East & Africa Automotive AI Box Sales by Type (2021-2026) & (K Units)
Table 68. Middle East & Africa Automotive AI Box Sales by Application (2021-2026) & (K Units)
Table 69. Key Market Drivers & Growth Opportunities of Automotive AI Box
Table 70. Key Market Challenges & Risks of Automotive AI Box
Table 71. Key Industry Trends of Automotive AI Box
Table 72. Automotive AI Box Raw Material
Table 73. Key Suppliers of Raw Materials
Table 74. Automotive AI Box Distributors List
Table 75. Automotive AI Box Customer List
Table 76. Global Automotive AI Box Sales Forecast by Region (2027-2032) & (K Units)
Table 77. Global Automotive AI Box Revenue Forecast by Region (2027-2032) & ($ millions)
Table 78. Americas Automotive AI Box Sales Forecast by Country (2027-2032) & (K Units)
Table 79. Americas Automotive AI Box Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 80. APAC Automotive AI Box Sales Forecast by Region (2027-2032) & (K Units)
Table 81. APAC Automotive AI Box Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Europe Automotive AI Box Sales Forecast by Country (2027-2032) & (K Units)
Table 83. Europe Automotive AI Box Revenue Forecast by Country (2027-2032) & ($ millions)

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Table 84. Middle East & Africa Automotive AI Box Sales Forecast by Country (2027-2032) & (K Units)
Table 85. Middle East & Africa Automotive AI Box Revenue Forecast by Country (2027-2032) & ($ millions)
Table 86. Global Automotive AI Box Sales Forecast by Type (2027-2032) & (K Units)
Table 87. Global Automotive AI Box Revenue Forecast by Type (2027-2032) & ($ millions)
Table 88. Global Automotive AI Box Sales Forecast by Application (2027-2032) & (K Units)
Table 89. Global Automotive AI Box Revenue Forecast by Application (2027-2032) & ($ millions)
Table 90. Kontron AG Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 91. Kontron AG Automotive AI Box Product Portfolios and Specifications
Table 92. Kontron AG Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 93. Kontron AG Main Business
Table 94. Kontron AG Latest Developments
Table 95. Stereolabs Inc. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 96. Stereolabs Inc. Automotive AI Box Product Portfolios and Specifications
Table 97. Stereolabs Inc. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 98. Stereolabs Inc. Main Business
Table 99. Stereolabs Inc. Latest Developments
Table 100. Premio Inc. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 101. Premio Inc. Automotive AI Box Product Portfolios and Specifications
Table 102. Premio Inc. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 103. Premio Inc. Main Business
Table 104. Premio Inc. Latest Developments
Table 105. Eurotech S.p.A. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 106. Eurotech S.p.A. Automotive AI Box Product Portfolios and Specifications
Table 107. Eurotech S.p.A. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 108. Eurotech S.p.A. Main Business
Table 109. Eurotech S.p.A. Latest Developments

+357 96 030922
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Table 110. Vecow Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 111. Vecow Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 112. Vecow Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 113. Vecow Co., Ltd. Main Business
Table 114. Vecow Co., Ltd. Latest Developments
Table 115. Lanner Electronics Inc. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 116. Lanner Electronics Inc. Automotive AI Box Product Portfolios and Specifications
Table 117. Lanner Electronics Inc. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 118. Lanner Electronics Inc. Main Business
Table 119. Lanner Electronics Inc. Latest Developments
Table 120. Cincoze Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 121. Cincoze Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 122. Cincoze Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 123. Cincoze Co., Ltd. Main Business
Table 124. Cincoze Co., Ltd. Latest Developments
Table 125. Desay SV Automotive Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 126. Desay SV Automotive Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 127. Desay SV Automotive Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 128. Desay SV Automotive Co., Ltd. Main Business
Table 129. Desay SV Automotive Co., Ltd. Latest Developments
Table 130. Huizhou Foryou General Electronics Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 131. Huizhou Foryou General Electronics Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 132. Huizhou Foryou General Electronics Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 133. Huizhou Foryou General Electronics Co., Ltd. Main Business
Table 134. Huizhou Foryou General Electronics Co., Ltd. Latest Developments
Table 135. ThunderSoft Co., Ltd. Basic Information, Automotive AI Box Manufacturing

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Base, Sales Area and Its Competitors
Table 136. ThunderSoft Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 137. ThunderSoft Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 138. ThunderSoft Co., Ltd. Main Business
Table 139. ThunderSoft Co., Ltd. Latest Developments
Table 140. Wuxi Auto-Link Intelligent Technology Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 141. Wuxi Auto-Link Intelligent Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 142. Wuxi Auto-Link Intelligent Technology Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 143. Wuxi Auto-Link Intelligent Technology Co., Ltd. Main Business
Table 144. Wuxi Auto-Link Intelligent Technology Co., Ltd. Latest Developments
Table 145. PATEO CONNECT+ Technology Shanghai Corporation Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 146. PATEO CONNECT+ Technology Shanghai Corporation Automotive AI Box Product Portfolios and Specifications
Table 147. PATEO CONNECT+ Technology Shanghai Corporation Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 148. PATEO CONNECT+ Technology Shanghai Corporation Main Business
Table 149. PATEO CONNECT+ Technology Shanghai Corporation Latest Developments
Table 150. BICV Technology Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 151. BICV Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 152. BICV Technology Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 153. BICV Technology Co., Ltd. Main Business
Table 154. BICV Technology Co., Ltd. Latest Developments
Table 155. MeiG Smart Technology Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 156. MeiG Smart Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 157. MeiG Smart Technology Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 158. MeiG Smart Technology Co., Ltd. Main Business

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Table 159. MeiG Smart Technology Co., Ltd. Latest Developments
Table 160. Lenovo Group Limited Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 161. Lenovo Group Limited Automotive AI Box Product Portfolios and Specifications
Table 162. Lenovo Group Limited Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 163. Lenovo Group Limited Main Business
Table 164. Lenovo Group Limited Latest Developments
Table 165. ArcherMind Technology Nanjing Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 166. ArcherMind Technology Nanjing Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 167. ArcherMind Technology Nanjing Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 168. ArcherMind Technology Nanjing Co., Ltd. Main Business
Table 169. ArcherMind Technology Nanjing Co., Ltd. Latest Developments
Table 170. Neusoft Corporation Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 171. Neusoft Corporation Automotive AI Box Product Portfolios and Specifications
Table 172. Neusoft Corporation Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 173. Neusoft Corporation Main Business
Table 174. Neusoft Corporation Latest Developments
Table 175. ThunderX Auto Technology Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 176. ThunderX Auto Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 177. ThunderX Auto Technology Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 178. ThunderX Auto Technology Co., Ltd. Main Business
Table 179. ThunderX Auto Technology Co., Ltd. Latest Developments
Table 180. Banma Intelligence Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 181. Banma Intelligence Automotive AI Box Product Portfolios and Specifications
Table 182. Banma Intelligence Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 183. Banma Intelligence Main Business

+357 96 030922
info@marketpublishers.com

Table 184. Banma Intelligence Latest Developments
Table 185. DONGFENG Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 186. DONGFENG Automotive AI Box Product Portfolios and Specifications
Table 187. DONGFENG Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 188. DONGFENG Main Business
Table 189. DONGFENG Latest Developments
Table 190. ModelBest Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 191. ModelBest Automotive AI Box Product Portfolios and Specifications
Table 192. ModelBest Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 193. ModelBest Main Business
Table 194. ModelBest Latest Developments
Table 195. TWOWIN Information Technology Shenzhen Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 196. TWOWIN Information Technology Shenzhen Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 197. TWOWIN Information Technology Shenzhen Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 198. TWOWIN Information Technology Shenzhen Co., Ltd. Main Business
Table 199. TWOWIN Information Technology Shenzhen Co., Ltd. Latest Developments
Table 200. STONKAM Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 201. STONKAM Automotive AI Box Product Portfolios and Specifications
Table 202. STONKAM Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 203. STONKAM Main Business
Table 204. STONKAM Latest Developments
Table 205. Advantech Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 206. Advantech Automotive AI Box Product Portfolios and Specifications
Table 207. Advantech Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 208. Advantech Main Business
Table 209. Advantech Latest Developments
Table 210. AAEON Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors

+357 96 030922
info@marketpublishers.com

Table 211. AAEON Automotive AI Box Product Portfolios and Specifications
Table 212. AAEON Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 213. AAEON Main Business
Table 214. AAEON Latest Developments
Table 215. ADLINK Technology Inc. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 216. ADLINK Technology Inc. Automotive AI Box Product Portfolios and Specifications
Table 217. ADLINK Technology Inc. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 218. ADLINK Technology Inc. Main Business
Table 219. ADLINK Technology Inc. Latest Developments
Table 220. ARBOR Technology Corp. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 221. ARBOR Technology Corp. Automotive AI Box Product Portfolios and Specifications
Table 222. ARBOR Technology Corp. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 223. ARBOR Technology Corp. Main Business
Table 224. ARBOR Technology Corp. Latest Developments
Table 225. Axiomtek Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 226. Axiomtek Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 227. Axiomtek Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 228. Axiomtek Co., Ltd. Main Business
Table 229. Axiomtek Co., Ltd. Latest Developments
Table 230. Neousys Technology Inc. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 231. Neousys Technology Inc. Automotive AI Box Product Portfolios and Specifications
Table 232. Neousys Technology Inc. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 233. Neousys Technology Inc. Main Business
Table 234. Neousys Technology Inc. Latest Developments
Table 235. NEXCOM International Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 236. NEXCOM International Co., Ltd. Automotive AI Box Product Portfolios and

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Specifications
Table 237. NEXCOM International Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 238. NEXCOM International Co., Ltd. Main Business
Table 239. NEXCOM International Co., Ltd. Latest Developments
Table 240. Suzhou Youkong Zhixing Technology Co., Ltd. Basic Information, Automotive AI Box Manufacturing Base, Sales Area and Its Competitors
Table 241. Suzhou Youkong Zhixing Technology Co., Ltd. Automotive AI Box Product Portfolios and Specifications
Table 242. Suzhou Youkong Zhixing Technology Co., Ltd. Automotive AI Box Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 243. Suzhou Youkong Zhixing Technology Co., Ltd. Main Business
Table 244. Suzhou Youkong Zhixing Technology Co., Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automotive AI Box
Figure 2. Automotive AI Box Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Automotive AI Box Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global Automotive AI Box Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Automotive AI Box Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Automotive AI Box Sales Market Share by Country/Region (2025)
Figure 10. Automotive AI Box Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Cockpit AI Box
Figure 12. Product Picture of Telematics and Fleet AI Box
Figure 13. Product Picture of Vision Safety and ADAS AI Box
Figure 14. Product Picture of Autonomous Driving and Special-Vehicle AI Box
Figure 15. Global Automotive AI Box Sales Market Share by Type in 2026
Figure 16. Global Automotive AI Box Revenue Market Share by Type (2021-2026)
Figure 17. Product Picture of Below 25 TOPS
Figure 18. Product Picture of 25 To Below 100 TOPS
Figure 19. Product Picture of 100 To Below 200 TOPS
Figure 20. Product Picture of 200 TOPS and Above
Figure 21. Global Automotive AI Box Sales Market Share by AI Compute Performance in 2026
Figure 22. Global Automotive AI Box Revenue Market Share by AI Compute Performance (2021-2026)
Figure 23. Product Picture of OEM-Fitted AI Boxes
Figure 24. Product Picture of Aftermarket AI Boxes
Figure 25. Global Automotive AI Box Sales Market Share by Installation Channel in 2026
Figure 26. Global Automotive AI Box Revenue Market Share by Installation Channel (2021-2026)
Figure 27. Automotive AI Box Consumed in Passenger Cars
Figure 28. Global Automotive AI Box Market: Passenger Cars (2021-2026) & (K Units)
Figure 29. Automotive AI Box Consumed in Commercial Vehicles

+357 96 030922
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Figure 30. Global Automotive AI Box Market: Commercial Vehicles (2021-2026) & (K Units)
Figure 31. Global Automotive AI Box Sale Market Share by Application (2025)
Figure 32. Global Automotive AI Box Revenue Market Share by Application in 2025
Figure 33. Automotive AI Box Sales by Company in 2025 (K Units)
Figure 34. Global Automotive AI Box Sales Market Share by Company in 2025
Figure 35. Automotive AI Box Revenue by Company in 2025 ($ millions)
Figure 36. Global Automotive AI Box Revenue Market Share by Company in 2025
Figure 37. Global Automotive AI Box Sales Market Share by Geographic Region (2021-2026)
Figure 38. Global Automotive AI Box Revenue Market Share by Geographic Region in 2025
Figure 39. Americas Automotive AI Box Sales 2021-2026 (K Units)
Figure 40. Americas Automotive AI Box Revenue 2021-2026 ($ millions)
Figure 41. APAC Automotive AI Box Sales 2021-2026 (K Units)
Figure 42. APAC Automotive AI Box Revenue 2021-2026 ($ millions)
Figure 43. Europe Automotive AI Box Sales 2021-2026 (K Units)
Figure 44. Europe Automotive AI Box Revenue 2021-2026 ($ millions)
Figure 45. Middle East & Africa Automotive AI Box Sales 2021-2026 (K Units)
Figure 46. Middle East & Africa Automotive AI Box Revenue 2021-2026 ($ millions)
Figure 47. Americas Automotive AI Box Sales Market Share by Country in 2025
Figure 48. Americas Automotive AI Box Revenue Market Share by Country (2021-2026)
Figure 49. Americas Automotive AI Box Sales Market Share by Type (2021-2026)
Figure 50. Americas Automotive AI Box Sales Market Share by Application (2021-2026)
Figure 51. United States Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 52. Canada Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 53. Mexico Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 54. Brazil Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 55. APAC Automotive AI Box Sales Market Share by Region in 2025
Figure 56. APAC Automotive AI Box Revenue Market Share by Region (2021-2026)
Figure 57. APAC Automotive AI Box Sales Market Share by Type (2021-2026)
Figure 58. APAC Automotive AI Box Sales Market Share by Application (2021-2026)
Figure 59. China Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 60. Japan Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 61. South Korea Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 62. Southeast Asia Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 63. India Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 64. Australia Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 65. China Taiwan Automotive AI Box Revenue Growth 2021-2026 ($ millions)

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Figure 66. Europe Automotive AI Box Sales Market Share by Country in 2025
Figure 67. Europe Automotive AI Box Revenue Market Share by Country (2021-2026)
Figure 68. Europe Automotive AI Box Sales Market Share by Type (2021-2026)
Figure 69. Europe Automotive AI Box Sales Market Share by Application (2021-2026)
Figure 70. Germany Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 71. France Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 72. UK Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 73. Italy Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 74. Russia Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 75. Middle East & Africa Automotive AI Box Sales Market Share by Country (2021-2026)
Figure 76. Middle East & Africa Automotive AI Box Sales Market Share by Type (2021-2026)
Figure 77. Middle East & Africa Automotive AI Box Sales Market Share by Application (2021-2026)
Figure 78. Egypt Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 79. South Africa Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 80. Israel Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 81. Turkey Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 82. GCC Countries Automotive AI Box Revenue Growth 2021-2026 ($ millions)
Figure 83. Manufacturing Cost Structure Analysis of Automotive AI Box in 2026
Figure 84. Manufacturing Process Analysis of Automotive AI Box
Figure 85. Industry Chain Structure of Automotive AI Box
Figure 86. Channels of Distribution
Figure 87. Global Automotive AI Box Sales Market Forecast by Region (2027-2032)
Figure 88. Global Automotive AI Box Revenue Market Share Forecast by Region (2027-2032)
Figure 89. Global Automotive AI Box Sales Market Share Forecast by Type (2027-2032)
Figure 90. Global Automotive AI Box Revenue Market Share Forecast by Type (2027-2032)
Figure 91. Global Automotive AI Box Sales Market Share Forecast by Application (2027-2032)
Figure 92. Global Automotive AI Box Revenue Market Share Forecast by Application (2027-2032)

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