

Global Automotive Connected Navigation Systems Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Automotive Connected Navigation Systems market size is predicted to grow from US\$ 5067 million in 2025 to US\$ 8515 million in 2032; it is expected to grow at a CAGR of 7.5% from 2026 to 2032.

Automotive Connected Navigation Systems refer to OEM-grade, vehicle-integrated navigation solutions installed or enabled by automakers before vehicle delivery. They combine positioning, digital maps, route calculation, real-time traffic, turn-by-turn guidance, lane-level guidance, voice and visual instructions, EV routing, speed-limit and road-attribute information, OTA map updates, location services and increasingly AI-enabled mobility assistance. The research object primarily covers embedded navigation applications, navigation SDKs, automotive map data, routing engines, online traffic and location services, navigation software modules within IVI systems, and cockpit-integrated navigation solutions used across center displays, instrument clusters, HUDs and smart cockpit domain controllers.

Depending on scope and contractual model, software, map and service value per equipped vehicle is commonly assessed in a broad range of approximately USD 15?80, while full IVI hardware systems can carry a materially higher value; this report?s revenue model focuses on the navigation-related software, data, service and functional module layer rather than the full cockpit hardware bill of materials.

Automotive Connected Navigation Systems are evolving from conventional route-guidance tools into a vehicle-native mobility intelligence layer. Their value is increasingly defined by the ability to combine digital maps, real-time traffic, lane-level guidance, EV routing, speed-limit data, driver preferences, voice interaction and cloud updates within the OEM cockpit environment. Unlike smartphone navigation

applications, OEM-grade systems must be integrated into vehicle displays, instrument clusters, HUDs, AR-HUDs and cockpit domain controllers, while also meeting automotive requirements for reliability, compliance, updateability and brand-specific user experience. For this reason, the revenue scope of this report focuses on navigation-related software, map data, SDKs, online services and functional modules, rather than the full value of infotainment hardware or general-purpose mobile map applications.

The global supply structure is layered rather than concentrated in a single type of vendor. HERE, TomTom, Google, Mapbox, NNG, Telenav and Sygic represent the core map, software and navigation-platform segment; Panasonic Automotive, HARMAN, Garmin, DENSO TEN, Mitsubishi Electric Mobility and Alpine are more closely linked to IVI and cockpit integration; while Neusoft, NavInfo, AutoNavi and Baidu are increasingly important in China and in export programs led by Chinese automakers. The distinction between a broad supplier longlist and a core formal list is therefore necessary: many companies provide relevant technologies, but only a smaller subset has sufficiently clear evidence of OEM-grade navigation products, recurring automotive navigation revenue or system-level integration responsibility.

Demand growth is supported by the shift toward software-defined vehicles, higher smart cockpit penetration, EV route planning, Chinese vehicle exports, regulatory requirements for speed assistance, and the integration of generative AI into in-car experiences. Google's recent updates for Android Auto and cars with Google built-in, including Gemini and immersive navigation features, indicate that navigation is becoming a conversational, contextual and service-rich cockpit function. At the same time, TomTom's Automotive Navigation Application and Neusoft's OneCoreGo demonstrate how navigation is being packaged with SDKs, AR guidance, EV capabilities, payment, connected services and AI mobility assistance. These developments suggest that navigation suppliers will compete not only on map coverage, but also on integration speed, data freshness, compliance support and user-experience differentiation.

Regulation is also reshaping the market. The EU's requirement for Intelligent Speed Assistance in new vehicles strengthens the role of validated speed-limit data, road-attribute data and continuous map updates. This creates a bridge between traditional navigation, eHorizon, ADAS maps and cockpit guidance. Suppliers with strong data validation processes, cross-border map coverage, vehicle-grade SDKs and proven OEM delivery capability are likely to gain share, while suppliers limited to consumer applications or local map services may face rising entry barriers in global OEM

programs.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Connected Navigation Systems and breaks down the forecast by Product Layer, 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 Connected Navigation Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive Connected Navigation Systems market by product type, application, key players and key regions and countries.

Segmentation by Product Layer:

Navigation Software / Application

Navigation SDK / Engine

Automotive Map Data & Services

Integrated IVI Navigation Module

Other

Segmentation by Connectivity Mode:

Embedded Offline-Capable Navigation

Connected Cloud Navigation

Hybrid Navigation

Other

Segmentation by Functional Use Case:

Standard Turn-by-Turn Navigation

Lane-Level / 3D Navigation

EV Routing & Charging Navigation

AR / HUD Navigation

Other

Segmentation by Application:

Passenger Cars

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

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 analyzing the company's coverage, product portfolio, its market penetration.

Google LLC

HERE Technologies

TomTom N.V.

Neusoft Corporation

AutoNavi Software

Baidu, Inc.

NavInfo Co., Ltd.

Mapbox, Inc.

HARMAN International

Panasonic Automotive Systems

Garmin Ltd.

NNG LLC

Telenav, Inc.

Continental

DENSO TEN Limited

Mitsubishi Electric Mobility

Bosch

Sygic a.s.

Desay SV

PATEO CONNECT+

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