

Global Automotive Navigation Map Data Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Automotive Navigation Map Data market size is predicted to grow from US\$ 2739 million in 2025 to US\$ 4837 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

Automotive Navigation Map Data refers to structured geospatial datasets developed, compiled and continuously maintained for in-vehicle positioning, destination search, route calculation, turn-by-turn guidance, lane guidance and map visualization. The core content covers road networks and topology, road classifications, driving directions, turn restrictions, speed limits, toll attributes, addresses, points of interest, entrances and exits, lane connectivity and related navigation attributes. Products are delivered through embedded offline databases, cloud-based data services or hybrid architectures combining local map storage with incremental over-the-air updates. The market primarily covers standard road-level navigation data, lane-level navigation data, navigation-oriented ADAS attributes, and 2D, 2.5D or 3D spatial content deployed in passenger vehicles, commercial vehicles and connected navigation platforms. Its commercial value is derived from geographic coverage, data freshness, positional and semantic accuracy, vehicle-platform compatibility, localization, regulatory compliance and the ability to support scalable integration across multiple vehicle models and markets.

Key Findings

Standard road-level map data remains the core product layer for embedded vehicle navigation

Lane-level guidance and 3D representation are the principal navigation map upgrade

directions

Hybrid embedded-cloud delivery is becoming the preferred architecture for freshness and offline continuity

Competition is regionally concentrated, with global platforms and strong local map specialists coexisting

Market Trends

Automotive Navigation Map Data is evolving from periodically updated road databases into continuously refreshed, multilayer digital road representations. Conventional standard-definition maps remain the foundation for routing and driver guidance, while lane topology, complex-intersection modelling, three-dimensional road geometry, parking information and navigation-oriented ADAS attributes are increasingly integrated into the same production and delivery architecture. The transition to software-defined vehicles is also shifting map deployment from fixed onboard databases toward hybrid systems that retain essential navigation data locally while obtaining incremental updates, traffic events and regional content from the cloud. Industry standards are moving in the same direction: the NDS ecosystem has expanded from conventional navigation databases to distributed data services supporting navigation, electronic horizon, ADAS and high-definition content. As a result, future differentiation will depend less on basic road coverage alone and increasingly on data freshness, lane-level accuracy, semantic richness, update latency and the ability to support unified navigation and intelligent-driving user experiences.

Market Dynamics

Drivers

Demand is supported by the continued digitalization of vehicle cockpits, increasing adoption of embedded and connected navigation, and OEM efforts to retain control over branded in-vehicle user experiences. More sophisticated electric-vehicle routing, lane-level guidance, intelligent speed assistance, parking navigation and commercial-vehicle routing require richer road attributes than conventional turn-by-turn navigation. Greater vehicle connectivity also enables map providers to deliver incremental updates and dynamic content throughout the vehicle lifecycle, strengthening recurring data and service demand.

Restraints

The market is constrained by high fixed costs for nationwide or multinational data acquisition, verification, compilation and continuous maintenance. Regulatory requirements, geographic-data restrictions and local map-review procedures make cross-border replication difficult, particularly where vehicle-generated geographic information is subject to licensing and security controls. Free smartphone navigation also limits the pricing power of basic vehicle maps, while OEM procurement concentration and long vehicle-development cycles place pressure on suppliers to provide customized integration, long-term maintenance and quality assurance at controlled cost.

Opportunities

The most attractive opportunities are concentrated in navigation upgrades rather than basic road coverage. Lane-level route guidance, 3D junction and landmark representation, electric-vehicle charging and range data, indoor and outdoor parking continuity, truck-specific restrictions and cloud-based incremental updating can increase the value of established map databases without requiring a completely separate national base map. Additional opportunities arise from OEM in-house navigation development, where automakers purchase map data and update services while retaining control of the navigation engine, interface and customer data. Regional suppliers can also expand through localized road attributes, language content and regulatory expertise that global platforms cannot replicate efficiently in every market.

Challenges

Long-term challenges include maintaining data consistency across road-level, lane-level, three-dimensional and dynamic layers; allocating responsibility when outdated or incorrect map attributes affect navigation outcomes; and achieving interoperability among proprietary map databases, vehicle operating systems and navigation engines. Crowdsourced and vehicle-probe data can improve update frequency, but they also increase requirements for validation, privacy management and geographic-information compliance. Suppliers must additionally balance investment in advanced map content against uncertain OEM willingness to pay, particularly as navigation, ADAS and high-definition map functions converge within integrated vehicle software platforms.

Value Chain Analysis

The upstream portion of the Automotive Navigation Map Data value chain consists of road surveys, mapping vehicles, satellite and aerial imagery, government road information, address and point-of-interest sources, vehicle-probe data, traffic information and positioning technologies. These inputs vary considerably in update frequency, positional precision, licensing conditions and geographic coverage. Reliable production therefore requires continuous reconciliation among physical surveys, authoritative road records, partner data and user- or vehicle-generated observations rather than a one-time collection process.

Midstream participants convert raw geospatial inputs into standardized road networks, navigation attributes, lane models, three-dimensional objects and regional map packages. Value is created through topology construction, semantic coding, localization, quality control, database compilation, vehicle-platform adaptation and incremental-update management. The downstream market comprises automakers, automotive Tier 1 suppliers, navigation software developers, digital-cockpit integrators, fleet-management platforms and commercial-vehicle telematics providers. Cost is concentrated in collection, verification, continuous maintenance, cloud infrastructure and customer-specific integration, while profitability improves when a common database can be reused across customers, vehicle platforms and applications. However, extensive customization, long support periods and local compliance obligations can reduce the scalability of individual contracts.

Segment Insights

By functional level, standard-definition road navigation data remains the market foundation because it supports route calculation, destination search and basic guidance across the broadest installed vehicle base. Lane-level navigation data represents a higher-value upgrade, adding lane connectivity, lane selection and detailed intersection guidance while remaining primarily oriented toward the driver and navigation application. ADAS-enhanced attributes, such as road curvature, gradient, heading and speed restrictions, are increasingly integrated into premium navigation datasets, while high-definition-derived lane geometry is selectively used where it improves advanced guidance and positioning continuity.

By spatial representation, 2D and 2.5D data continue to account for the majority of mainstream navigation deployments because of their lower storage, processing and rendering requirements. Three-dimensional navigation data is expanding in premium vehicles and complex urban environments, particularly for junction visualization, lane guidance, buildings, landmarks, bridges and multilevel roads. By delivery architecture,

embedded offline databases remain important for availability and safety, cloud-based data enables rapid freshness, and hybrid map architectures offer the strongest balance between reliability, bandwidth efficiency and continuous updating.

Downstream Market Opportunities

OEM embedded navigation remains the principal downstream market because automakers require stable lifecycle support, brand-specific interfaces and integration with vehicle positioning, instrument clusters, head-up displays and connected services. Commercial-vehicle and fleet navigation offers a differentiated opportunity through vehicle-dimension restrictions, weight limits, hazardous-material rules and logistics-specific points of interest. Electric vehicles create additional demand for charging-location accuracy, real-time availability, energy-aware routing and range calculation, while connected cockpits increase demand for cloud search, parking data, traffic events and seamless handover between mobile and in-vehicle navigation.

Regional Insights

Europe and North America are characterized by globally scalable map platforms, mature automotive software ecosystems and strong demand for cloud-connected navigation, ADAS integration and standardized data delivery. These markets favor suppliers capable of supporting multiple OEM groups, countries, languages and vehicle platforms through common map architectures. Japan and South Korea maintain strong domestic map specialists with detailed local databases, close OEM relationships and deep adaptation to complex road and address systems. ZENRIN, Toyota Mapmaster and Hyundai AutoEver illustrate the continuing importance of locally maintained automotive map assets even as global standards and cloud delivery expand.

China combines large-scale connected-vehicle demand with stringent mapping qualification, security-review and geographic-data governance requirements, favoring domestic suppliers with compliant data production and update capabilities. The market is also moving toward integrated navigation, lane-level, ADAS, high-definition and parking-map architectures. India represents another localized opportunity, where domestic road conditions, addressing systems, commercial-vehicle requirements and offline navigation needs support regionally specialized map platforms. Across Asia-Pacific, localization capability and regulatory execution are therefore as important as technological scale.

Competitive Landscape Analysis

The Automotive Navigation Map Data market is best described as a regionally concentrated oligopolistic market rather than a single-supplier monopoly. Global platforms such as HERE and TomTom compete through multinational coverage, standardized data delivery, cloud services and integration across navigation and driver-assistance functions. Mapbox competes through developer-oriented software and customizable map architectures, while regional specialists retain advantages in local road detail, language content, address systems, regulatory compliance and established OEM relationships. Japan's ZENRIN and Toyota Mapmaster, South Korea's Hyundai AutoEver and other domestic platforms, India's Mappls, and China's established navigation-map providers demonstrate that local data depth remains a substantial competitive barrier. Competition is increasingly shifting from possession of a basic road database toward update speed, lane-level coverage, three-dimensional content, hybrid delivery, OEM integration and the ability to combine map data with routing, traffic, parking and ADAS functions. Bundled platforms can increase customer switching costs, but they also create openings for data suppliers that support modular procurement and OEM-controlled navigation architectures.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Automotive Navigation Map Data 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 Navigation Map Data portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive Navigation Map Data market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Navigation Map Data 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 Navigation Map Data.

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

Market Segmentation

Segmentation by Type:

Standard Definition Navigation Map Data

Lane-Level Navigation Map Data

ADAS Map Data

High-Definition Map Data

Segmentation by Spatial Representation:

2D and 2.5D Navigation Map Data

3D Navigation Map Data

Segmentation by Delivery Architecture:

Embedded and Offline Map Data

Cloud-Based Online Map Data

Hybrid Map Data

Segmentation by Application:

Passenger Vehicle

Commercial Vehicle

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.

HERE Technologies

TomTom

ZENRIN

Toyota Mapmaster

Hyundai AutoEver

Mappers

Mapbox

GeoTechnologies

Trimble Maps

CE Info Systems Limited (Mappls & MapmyIndia)

Kakao Mobility

TMAP Mobility

Dynamic Map Platform

Ba?arsoft Bilgi Teknolojileri A.?.

GrabMaps

AutoNavi Software Co., Ltd.

NavInfo

Google LLC

Apple

Navmii Publishing Ltd.

Shenzhen Careland Technology Co., Ltd.

Amap Software Co., Ltd.

Beijing Changdiwanfang Technology Co., Ltd

Beijing NavInfo Co., Ltd.

Tencent Dadi Tongtu

Langge Technology

CICV Data

KUANDENG

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 Navigation Map Data Market Size (2021-2032)
- 2.1.2 Automotive Navigation Map Data Market Size CAGR by Region (2021 VS 2025 VS 2032)
- 2.1.3 World Current & Future Analysis for Automotive Navigation Map Data by Country/Region (2021, 2025 & 2032)

2.2 Automotive Navigation Map Data Segment by Type

- 2.2.1 Standard Definition Navigation Map Data
- 2.2.2 Lane-Level Navigation Map Data
- 2.2.3 ADAS Map Data
- 2.2.4 High-Definition Map Data
- 2.2.5 Automotive Navigation Map Data Market Size by Type
 - 2.2.5.1 Automotive Navigation Map Data Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.5.2 Global Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

2.3 Automotive Navigation Map Data Segment by Spatial Representation

- 2.3.1 2D and 2.5D Navigation Map Data
- 2.3.2 3D Navigation Map Data
- 2.3.3 Automotive Navigation Map Data Market Size by Spatial Representation
 - 2.3.3.1 Automotive Navigation Map Data Market Size CAGR by Spatial Representation (2021 VS 2025 VS 2032)
 - 2.3.3.2 Global Automotive Navigation Map Data Market Size Market Share by Spatial Representation (2021-2026)

2.4 Automotive Navigation Map Data Segment by Delivery Architecture

2.4.1 Embedded and Offline Map Data

2.4.2 Cloud-Based Online Map Data

2.4.3 Hybrid Map Data

2.4.4 Automotive Navigation Map Data Market Size by Delivery Architecture

2.4.4.1 Automotive Navigation Map Data Market Size CAGR by Delivery Architecture (2021 VS 2025 VS 2032)

2.4.4.2 Global Automotive Navigation Map Data Market Size Market Share by Delivery Architecture (2021-2026)

2.5 Automotive Navigation Map Data Segment by Application

2.5.1 Passenger Vehicle

2.5.2 Commercial Vehicle

2.5.3 Automotive Navigation Map Data Market Size by Application

2.5.3.1 Automotive Navigation Map Data Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.5.3.2 Global Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

3 AUTOMOTIVE NAVIGATION MAP DATA MARKET SIZE BY PLAYER

3.1 Automotive Navigation Map Data Market Size Market Share by Player

3.1.1 Global Automotive Navigation Map Data Revenue by Player (2021-2026)

3.1.2 Global Automotive Navigation Map Data Revenue Market Share by Player (2021-2026)

3.2 Global Automotive Navigation Map Data Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 AUTOMOTIVE NAVIGATION MAP DATA BY REGION

4.1 Automotive Navigation Map Data Market Size by Region (2021-2026)

4.2 Global Automotive Navigation Map Data Annual Revenue by Country/Region (2021-2026)

4.3 Americas Automotive Navigation Map Data Market Size Growth (2021-2026)

4.4 APAC Automotive Navigation Map Data Market Size Growth (2021-2026)

4.5 Europe Automotive Navigation Map Data Market Size Growth (2021-2026)

4.6 Middle East & Africa Automotive Navigation Map Data Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Automotive Navigation Map Data Market Size by Country (2021-2026)

5.2 Americas Automotive Navigation Map Data Market Size by Type (2021-2026)

5.3 Americas Automotive Navigation Map Data Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Automotive Navigation Map Data Market Size by Region (2021-2026)

6.2 APAC Automotive Navigation Map Data Market Size by Type (2021-2026)

6.3 APAC Automotive Navigation Map Data Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Automotive Navigation Map Data Market Size by Country (2021-2026)

7.2 Europe Automotive Navigation Map Data Market Size by Type (2021-2026)

7.3 Europe Automotive Navigation Map Data Market Size 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 Navigation Map Data by Region (2021-2026)

8.2 Middle East & Africa Automotive Navigation Map Data Market Size by Type (2021-2026)

8.3 Middle East & Africa Automotive Navigation Map Data Market Size 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 GLOBAL AUTOMOTIVE NAVIGATION MAP DATA MARKET FORECAST

10.1 Global Automotive Navigation Map Data Forecast by Region (2027-2032)

10.1.1 Global Automotive Navigation Map Data Forecast by Region (2027-2032)

10.1.2 Americas Automotive Navigation Map Data Forecast

10.1.3 APAC Automotive Navigation Map Data Forecast

10.1.4 Europe Automotive Navigation Map Data Forecast

10.1.5 Middle East & Africa Automotive Navigation Map Data Forecast

10.2 Americas Automotive Navigation Map Data Forecast by Country (2027-2032)

10.2.1 United States Market Automotive Navigation Map Data Forecast

10.2.2 Canada Market Automotive Navigation Map Data Forecast

10.2.3 Mexico Market Automotive Navigation Map Data Forecast

10.2.4 Brazil Market Automotive Navigation Map Data Forecast

10.3 APAC Automotive Navigation Map Data Forecast by Region (2027-2032)

10.3.1 China Automotive Navigation Map Data Market Forecast

10.3.2 Japan Market Automotive Navigation Map Data Forecast

10.3.3 Korea Market Automotive Navigation Map Data Forecast

10.3.4 Southeast Asia Market Automotive Navigation Map Data Forecast

10.3.5 India Market Automotive Navigation Map Data Forecast

10.3.6 Australia Market Automotive Navigation Map Data Forecast

10.4 Europe Automotive Navigation Map Data Forecast by Country (2027-2032)

10.4.1 Germany Market Automotive Navigation Map Data Forecast

- 10.4.2 France Market Automotive Navigation Map Data Forecast
- 10.4.3 UK Market Automotive Navigation Map Data Forecast
- 10.4.4 Italy Market Automotive Navigation Map Data Forecast
- 10.4.5 Russia Market Automotive Navigation Map Data Forecast
- 10.5 Middle East & Africa Automotive Navigation Map Data Forecast by Region (2027-2032)
 - 10.5.1 Egypt Market Automotive Navigation Map Data Forecast
 - 10.5.2 South Africa Market Automotive Navigation Map Data Forecast
 - 10.5.3 Israel Market Automotive Navigation Map Data Forecast
 - 10.5.4 Turkey Market Automotive Navigation Map Data Forecast
- 10.6 Global Automotive Navigation Map Data Forecast by Type (2027-2032)
- 10.7 Global Automotive Navigation Map Data Forecast by Application (2027-2032)
 - 10.7.1 GCC Countries Market Automotive Navigation Map Data Forecast

11 KEY PLAYERS ANALYSIS

11.1 HERE Technologies

- 11.1.1 HERE Technologies Company Information
- 11.1.2 HERE Technologies Automotive Navigation Map Data Product Offered
- 11.1.3 HERE Technologies Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
- 11.1.4 HERE Technologies Main Business Overview
- 11.1.5 HERE Technologies Latest Developments

11.2 TomTom

- 11.2.1 TomTom Company Information
- 11.2.2 TomTom Automotive Navigation Map Data Product Offered
- 11.2.3 TomTom Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
- 11.2.4 TomTom Main Business Overview
- 11.2.5 TomTom Latest Developments

11.3 ZENRIN

- 11.3.1 ZENRIN Company Information
- 11.3.2 ZENRIN Automotive Navigation Map Data Product Offered
- 11.3.3 ZENRIN Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
- 11.3.4 ZENRIN Main Business Overview
- 11.3.5 ZENRIN Latest Developments

11.4 Toyota Mapmaster

- 11.4.1 Toyota Mapmaster Company Information

- 11.4.2 Toyota Mapmaster Automotive Navigation Map Data Product Offered
- 11.4.3 Toyota Mapmaster Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
- 11.4.4 Toyota Mapmaster Main Business Overview
- 11.4.5 Toyota Mapmaster Latest Developments
- 11.5 Hyundai AutoEver
 - 11.5.1 Hyundai AutoEver Company Information
 - 11.5.2 Hyundai AutoEver Automotive Navigation Map Data Product Offered
 - 11.5.3 Hyundai AutoEver Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.5.4 Hyundai AutoEver Main Business Overview
 - 11.5.5 Hyundai AutoEver Latest Developments
- 11.6 Mappers
 - 11.6.1 Mappers Company Information
 - 11.6.2 Mappers Automotive Navigation Map Data Product Offered
 - 11.6.3 Mappers Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.6.4 Mappers Main Business Overview
 - 11.6.5 Mappers Latest Developments
- 11.7 Mapbox
 - 11.7.1 Mapbox Company Information
 - 11.7.2 Mapbox Automotive Navigation Map Data Product Offered
 - 11.7.3 Mapbox Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.7.4 Mapbox Main Business Overview
 - 11.7.5 Mapbox Latest Developments
- 11.8 GeoTechnologies
 - 11.8.1 GeoTechnologies Company Information
 - 11.8.2 GeoTechnologies Automotive Navigation Map Data Product Offered
 - 11.8.3 GeoTechnologies Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.8.4 GeoTechnologies Main Business Overview
 - 11.8.5 GeoTechnologies Latest Developments
- 11.9 Trimble Maps
 - 11.9.1 Trimble Maps Company Information
 - 11.9.2 Trimble Maps Automotive Navigation Map Data Product Offered
 - 11.9.3 Trimble Maps Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.9.4 Trimble Maps Main Business Overview

- 11.9.5 Trimble Maps Latest Developments
- 11.10 CE Info Systems Limited (Mappls & MapmyIndia)
 - 11.10.1 CE Info Systems Limited (Mappls & MapmyIndia) Company Information
 - 11.10.2 CE Info Systems Limited (Mappls & MapmyIndia) Automotive Navigation Map Data Product Offered
 - 11.10.3 CE Info Systems Limited (Mappls & MapmyIndia) Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.10.4 CE Info Systems Limited (Mappls & MapmyIndia) Main Business Overview
 - 11.10.5 CE Info Systems Limited (Mappls & MapmyIndia) Latest Developments
- 11.11 Kakao Mobility
 - 11.11.1 Kakao Mobility Company Information
 - 11.11.2 Kakao Mobility Automotive Navigation Map Data Product Offered
 - 11.11.3 Kakao Mobility Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.11.4 Kakao Mobility Main Business Overview
 - 11.11.5 Kakao Mobility Latest Developments
- 11.12 TMAP Mobility
 - 11.12.1 TMAP Mobility Company Information
 - 11.12.2 TMAP Mobility Automotive Navigation Map Data Product Offered
 - 11.12.3 TMAP Mobility Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.12.4 TMAP Mobility Main Business Overview
 - 11.12.5 TMAP Mobility Latest Developments
- 11.13 Dynamic Map Platform
 - 11.13.1 Dynamic Map Platform Company Information
 - 11.13.2 Dynamic Map Platform Automotive Navigation Map Data Product Offered
 - 11.13.3 Dynamic Map Platform Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.13.4 Dynamic Map Platform Main Business Overview
 - 11.13.5 Dynamic Map Platform Latest Developments
- 11.14 Ba?arsoft Bilgi Teknolojileri A.?.
 - 11.14.1 Ba?arsoft Bilgi Teknolojileri A.?. Company Information
 - 11.14.2 Ba?arsoft Bilgi Teknolojileri A.?. Automotive Navigation Map Data Product Offered
 - 11.14.3 Ba?arsoft Bilgi Teknolojileri A.?. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.14.4 Ba?arsoft Bilgi Teknolojileri A.?. Main Business Overview
 - 11.14.5 Ba?arsoft Bilgi Teknolojileri A.?. Latest Developments
- 11.15 GrabMaps

- 11.15.1 GrabMaps Company Information
- 11.15.2 GrabMaps Automotive Navigation Map Data Product Offered
- 11.15.3 GrabMaps Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
- 11.15.4 GrabMaps Main Business Overview
- 11.15.5 GrabMaps Latest Developments
- 11.16 AutoNavi Software Co., Ltd.
 - 11.16.1 AutoNavi Software Co., Ltd. Company Information
 - 11.16.2 AutoNavi Software Co., Ltd. Automotive Navigation Map Data Product Offered
 - 11.16.3 AutoNavi Software Co., Ltd. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.16.4 AutoNavi Software Co., Ltd. Main Business Overview
 - 11.16.5 AutoNavi Software Co., Ltd. Latest Developments
- 11.17 NavInfo
 - 11.17.1 NavInfo Company Information
 - 11.17.2 NavInfo Automotive Navigation Map Data Product Offered
 - 11.17.3 NavInfo Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.17.4 NavInfo Main Business Overview
 - 11.17.5 NavInfo Latest Developments
- 11.18 Google LLC
 - 11.18.1 Google LLC Company Information
 - 11.18.2 Google LLC Automotive Navigation Map Data Product Offered
 - 11.18.3 Google LLC Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.18.4 Google LLC Main Business Overview
 - 11.18.5 Google LLC Latest Developments
- 11.19 Apple
 - 11.19.1 Apple Company Information
 - 11.19.2 Apple Automotive Navigation Map Data Product Offered
 - 11.19.3 Apple Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.19.4 Apple Main Business Overview
 - 11.19.5 Apple Latest Developments
- 11.20 Navmii Publishing Ltd.
 - 11.20.1 Navmii Publishing Ltd. Company Information
 - 11.20.2 Navmii Publishing Ltd. Automotive Navigation Map Data Product Offered
 - 11.20.3 Navmii Publishing Ltd. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)

- 11.20.4 Navmii Publishing Ltd. Main Business Overview
- 11.20.5 Navmii Publishing Ltd. Latest Developments
- 11.21 Shenzhen Careland Technology Co., Ltd.
 - 11.21.1 Shenzhen Careland Technology Co., Ltd. Company Information
 - 11.21.2 Shenzhen Careland Technology Co., Ltd. Automotive Navigation Map Data Product Offered
 - 11.21.3 Shenzhen Careland Technology Co., Ltd. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.21.4 Shenzhen Careland Technology Co., Ltd. Main Business Overview
 - 11.21.5 Shenzhen Careland Technology Co., Ltd. Latest Developments
- 11.22 Amap Software Co., Ltd.
 - 11.22.1 Amap Software Co., Ltd. Company Information
 - 11.22.2 Amap Software Co., Ltd. Automotive Navigation Map Data Product Offered
 - 11.22.3 Amap Software Co., Ltd. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.22.4 Amap Software Co., Ltd. Main Business Overview
 - 11.22.5 Amap Software Co., Ltd. Latest Developments
- 11.23 Beijing Changdiwanfang Technology Co., Ltd.
 - 11.23.1 Beijing Changdiwanfang Technology Co., Ltd Company Information
 - 11.23.2 Beijing Changdiwanfang Technology Co., Ltd Automotive Navigation Map Data Product Offered
 - 11.23.3 Beijing Changdiwanfang Technology Co., Ltd Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.23.4 Beijing Changdiwanfang Technology Co., Ltd Main Business Overview
 - 11.23.5 Beijing Changdiwanfang Technology Co., Ltd Latest Developments
- 11.24 Beijing NavInfo Co., Ltd.
 - 11.24.1 Beijing NavInfo Co., Ltd. Company Information
 - 11.24.2 Beijing NavInfo Co., Ltd. Automotive Navigation Map Data Product Offered
 - 11.24.3 Beijing NavInfo Co., Ltd. Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.24.4 Beijing NavInfo Co., Ltd. Main Business Overview
 - 11.24.5 Beijing NavInfo Co., Ltd. Latest Developments
- 11.25 Tencent Dadi Tongtu
 - 11.25.1 Tencent Dadi Tongtu Company Information
 - 11.25.2 Tencent Dadi Tongtu Automotive Navigation Map Data Product Offered
 - 11.25.3 Tencent Dadi Tongtu Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)
 - 11.25.4 Tencent Dadi Tongtu Main Business Overview
 - 11.25.5 Tencent Dadi Tongtu Latest Developments

11.26 Langge Technology

11.26.1 Langge Technology Company Information

11.26.2 Langge Technology Automotive Navigation Map Data Product Offered

11.26.3 Langge Technology Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)

11.26.4 Langge Technology Main Business Overview

11.26.5 Langge Technology Latest Developments

11.27 CICV Data

11.27.1 CICV Data Company Information

11.27.2 CICV Data Automotive Navigation Map Data Product Offered

11.27.3 CICV Data Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)

11.27.4 CICV Data Main Business Overview

11.27.5 CICV Data Latest Developments

11.28 KUANDENG

11.28.1 KUANDENG Company Information

11.28.2 KUANDENG Automotive Navigation Map Data Product Offered

11.28.3 KUANDENG Automotive Navigation Map Data Revenue, Gross Margin and Market Share (2021-2026)

11.28.4 KUANDENG Main Business Overview

11.28.5 KUANDENG Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Automotive Navigation Map Data Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Automotive Navigation Map Data Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Standard Definition Navigation Map Data

Table 4. Major Players of Lane-Level Navigation Map Data

Table 5. Major Players of ADAS Map Data

Table 6. Major Players of High-Definition Map Data

Table 7. Automotive Navigation Map Data Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 8. Global Automotive Navigation Map Data Market Size by Type (2021-2026) & (\$ millions)

Table 9. Global Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

Table 10. Major Players of 2D and 2.5D Navigation Map Data

Table 11. Major Players of 3D Navigation Map Data

Table 12. Automotive Navigation Map Data Market Size CAGR by Spatial Representation (2021 VS 2025 VS 2032) & (\$ millions)

Table 13. Global Automotive Navigation Map Data Market Size by Spatial Representation (2021-2026) & (\$ millions)

Table 14. Global Automotive Navigation Map Data Market Size Market Share by Spatial Representation (2021-2026)

Table 15. Major Players of Embedded and Offline Map Data

Table 16. Major Players of Cloud-Based Online Map Data

Table 17. Major Players of Hybrid Map Data

Table 18. Automotive Navigation Map Data Market Size CAGR by Delivery Architecture (2021 VS 2025 VS 2032) & (\$ millions)

Table 19. Global Automotive Navigation Map Data Market Size by Delivery Architecture (2021-2026) & (\$ millions)

Table 20. Global Automotive Navigation Map Data Market Size Market Share by Delivery Architecture (2021-2026)

Table 21. Automotive Navigation Map Data Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 22. Global Automotive Navigation Map Data Market Size by Application (2021-2026) & (\$ millions)

Table 23. Global Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

Table 24. Global Automotive Navigation Map Data Revenue by Player (2021-2026) & (\$ millions)

Table 25. Global Automotive Navigation Map Data Revenue Market Share by Player (2021-2026)

Table 26. Automotive Navigation Map Data Key Players Head office and Products Offered

Table 27. Automotive Navigation Map Data Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 28. New Products and Potential Entrants

Table 29. Mergers & Acquisitions, Expansion

Table 30. Global Automotive Navigation Map Data Market Size by Region (2021-2026) & (\$ millions)

Table 31. Global Automotive Navigation Map Data Market Size Market Share by Region (2021-2026)

Table 32. Global Automotive Navigation Map Data Revenue by Country/Region (2021-2026) & (\$ millions)

Table 33. Global Automotive Navigation Map Data Revenue Market Share by Country/Region (2021-2026)

Table 34. Americas Automotive Navigation Map Data Market Size by Country (2021-2026) & (\$ millions)

Table 35. Americas Automotive Navigation Map Data Market Size Market Share by Country (2021-2026)

Table 36. Americas Automotive Navigation Map Data Market Size by Type (2021-2026) & (\$ millions)

Table 37. Americas Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

Table 38. Americas Automotive Navigation Map Data Market Size by Application (2021-2026) & (\$ millions)

Table 39. Americas Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

Table 40. APAC Automotive Navigation Map Data Market Size by Region (2021-2026) & (\$ millions)

Table 41. APAC Automotive Navigation Map Data Market Size Market Share by Region (2021-2026)

Table 42. APAC Automotive Navigation Map Data Market Size by Type (2021-2026) & (\$ millions)

Table 43. APAC Automotive Navigation Map Data Market Size by Application

(2021-2026) & (\$ millions)

Table 44. Europe Automotive Navigation Map Data Market Size by Country (2021-2026) & (\$ millions)

Table 45. Europe Automotive Navigation Map Data Market Size Market Share by Country (2021-2026)

Table 46. Europe Automotive Navigation Map Data Market Size by Type (2021-2026) & (\$ millions)

Table 47. Europe Automotive Navigation Map Data Market Size by Application (2021-2026) & (\$ millions)

Table 48. Middle East & Africa Automotive Navigation Map Data Market Size by Region (2021-2026) & (\$ millions)

Table 49. Middle East & Africa Automotive Navigation Map Data Market Size by Type (2021-2026) & (\$ millions)

Table 50. Middle East & Africa Automotive Navigation Map Data Market Size by Application (2021-2026) & (\$ millions)

Table 51. Key Market Drivers & Growth Opportunities of Automotive Navigation Map Data

Table 52. Key Market Challenges & Risks of Automotive Navigation Map Data

Table 53. Key Industry Trends of Automotive Navigation Map Data

Table 54. Global Automotive Navigation Map Data Market Size Forecast by Region (2027-2032) & (\$ millions)

Table 55. Global Automotive Navigation Map Data Market Size Market Share Forecast by Region (2027-2032)

Table 56. Global Automotive Navigation Map Data Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 57. Global Automotive Navigation Map Data Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 58. HERE Technologies Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 59. HERE Technologies Automotive Navigation Map Data Product Offered

Table 60. HERE Technologies Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 61. HERE Technologies Main Business

Table 62. HERE Technologies Latest Developments

Table 63. TomTom Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 64. TomTom Automotive Navigation Map Data Product Offered

Table 65. TomTom Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 66. TomTom Main Business

Table 67. TomTom Latest Developments

Table 68. ZENRIN Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 69. ZENRIN Automotive Navigation Map Data Product Offered

Table 70. ZENRIN Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 71. ZENRIN Main Business

Table 72. ZENRIN Latest Developments

Table 73. Toyota Mapmaster Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 74. Toyota Mapmaster Automotive Navigation Map Data Product Offered

Table 75. Toyota Mapmaster Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 76. Toyota Mapmaster Main Business

Table 77. Toyota Mapmaster Latest Developments

Table 78. Hyundai AutoEver Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 79. Hyundai AutoEver Automotive Navigation Map Data Product Offered

Table 80. Hyundai AutoEver Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 81. Hyundai AutoEver Main Business

Table 82. Hyundai AutoEver Latest Developments

Table 83. Mappers Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 84. Mappers Automotive Navigation Map Data Product Offered

Table 85. Mappers Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 86. Mappers Main Business

Table 87. Mappers Latest Developments

Table 88. Mapbox Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 89. Mapbox Automotive Navigation Map Data Product Offered

Table 90. Mapbox Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 91. Mapbox Main Business

Table 92. Mapbox Latest Developments

Table 93. GeoTechnologies Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 94. GeoTechnologies Automotive Navigation Map Data Product Offered
Table 95. GeoTechnologies Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 96. GeoTechnologies Main Business
Table 97. GeoTechnologies Latest Developments
Table 98. Trimble Maps Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors
Table 99. Trimble Maps Automotive Navigation Map Data Product Offered
Table 100. Trimble Maps Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 101. Trimble Maps Main Business
Table 102. Trimble Maps Latest Developments
Table 103. CE Info Systems Limited (Mappls & MapmyIndia) Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors
Table 104. CE Info Systems Limited (Mappls & MapmyIndia) Automotive Navigation Map Data Product Offered
Table 105. CE Info Systems Limited (Mappls & MapmyIndia) Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 106. CE Info Systems Limited (Mappls & MapmyIndia) Main Business
Table 107. CE Info Systems Limited (Mappls & MapmyIndia) Latest Developments
Table 108. Kakao Mobility Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors
Table 109. Kakao Mobility Automotive Navigation Map Data Product Offered
Table 110. Kakao Mobility Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 111. Kakao Mobility Main Business
Table 112. Kakao Mobility Latest Developments
Table 113. TMAP Mobility Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors
Table 114. TMAP Mobility Automotive Navigation Map Data Product Offered
Table 115. TMAP Mobility Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 116. TMAP Mobility Main Business
Table 117. TMAP Mobility Latest Developments
Table 118. Dynamic Map Platform Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors
Table 119. Dynamic Map Platform Automotive Navigation Map Data Product Offered
Table 120. Dynamic Map Platform Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 121. Dynamic Map Platform Main Business

Table 122. Dynamic Map Platform Latest Developments

Table 123. Ba?arsoft Bilgi Teknolojileri A.?. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 124. Ba?arsoft Bilgi Teknolojileri A.?. Automotive Navigation Map Data Product Offered

Table 125. Ba?arsoft Bilgi Teknolojileri A.?. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 126. Ba?arsoft Bilgi Teknolojileri A.?. Main Business

Table 127. Ba?arsoft Bilgi Teknolojileri A.?. Latest Developments

Table 128. GrabMaps Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 129. GrabMaps Automotive Navigation Map Data Product Offered

Table 130. GrabMaps Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 131. GrabMaps Main Business

Table 132. GrabMaps Latest Developments

Table 133. AutoNavi Software Co., Ltd. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 134. AutoNavi Software Co., Ltd. Automotive Navigation Map Data Product Offered

Table 135. AutoNavi Software Co., Ltd. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 136. AutoNavi Software Co., Ltd. Main Business

Table 137. AutoNavi Software Co., Ltd. Latest Developments

Table 138. NavInfo Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 139. NavInfo Automotive Navigation Map Data Product Offered

Table 140. NavInfo Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 141. NavInfo Main Business

Table 142. NavInfo Latest Developments

Table 143. Google LLC Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 144. Google LLC Automotive Navigation Map Data Product Offered

Table 145. Google LLC Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 146. Google LLC Main Business

Table 147. Google LLC Latest Developments

Table 148. Apple Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 149. Apple Automotive Navigation Map Data Product Offered

Table 150. Apple Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 151. Apple Main Business

Table 152. Apple Latest Developments

Table 153. Navmii Publishing Ltd. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 154. Navmii Publishing Ltd. Automotive Navigation Map Data Product Offered

Table 155. Navmii Publishing Ltd. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 156. Navmii Publishing Ltd. Main Business

Table 157. Navmii Publishing Ltd. Latest Developments

Table 158. Shenzhen Careland Technology Co., Ltd. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 159. Shenzhen Careland Technology Co., Ltd. Automotive Navigation Map Data Product Offered

Table 160. Shenzhen Careland Technology Co., Ltd. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 161. Shenzhen Careland Technology Co., Ltd. Main Business

Table 162. Shenzhen Careland Technology Co., Ltd. Latest Developments

Table 163. Amap Software Co., Ltd. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 164. Amap Software Co., Ltd. Automotive Navigation Map Data Product Offered

Table 165. Amap Software Co., Ltd. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 166. Amap Software Co., Ltd. Main Business

Table 167. Amap Software Co., Ltd. Latest Developments

Table 168. Beijing Changdiwanfang Technology Co., Ltd Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 169. Beijing Changdiwanfang Technology Co., Ltd Automotive Navigation Map Data Product Offered

Table 170. Beijing Changdiwanfang Technology Co., Ltd Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 171. Beijing Changdiwanfang Technology Co., Ltd Main Business

Table 172. Beijing Changdiwanfang Technology Co., Ltd Latest Developments

Table 173. Beijing NavInfo Co., Ltd. Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 174. Beijing NavInfo Co., Ltd. Automotive Navigation Map Data Product Offered

Table 175. Beijing NavInfo Co., Ltd. Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 176. Beijing NavInfo Co., Ltd. Main Business

Table 177. Beijing NavInfo Co., Ltd. Latest Developments

Table 178. Tencent Dadi Tongtu Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 179. Tencent Dadi Tongtu Automotive Navigation Map Data Product Offered

Table 180. Tencent Dadi Tongtu Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 181. Tencent Dadi Tongtu Main Business

Table 182. Tencent Dadi Tongtu Latest Developments

Table 183. Langge Technology Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 184. Langge Technology Automotive Navigation Map Data Product Offered

Table 185. Langge Technology Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 186. Langge Technology Main Business

Table 187. Langge Technology Latest Developments

Table 188. CICV Data Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 189. CICV Data Automotive Navigation Map Data Product Offered

Table 190. CICV Data Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 191. CICV Data Main Business

Table 192. CICV Data Latest Developments

Table 193. KUANDENG Details, Company Type, Automotive Navigation Map Data Area Served and Its Competitors

Table 194. KUANDENG Automotive Navigation Map Data Product Offered

Table 195. KUANDENG Automotive Navigation Map Data Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 196. KUANDENG Main Business

Table 197. KUANDENG Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Automotive Navigation Map Data Report Years Considered

Figure 2. Research Objectives

Figure 3. Research Methodology

Figure 4. Research Process and Data Source

Figure 5. Global Automotive Navigation Map Data Market Size Growth Rate
(2021-2032) (\$ millions)

Figure 6. Automotive Navigation Map Data Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 7. Automotive Navigation Map Data Sales Market Share by Country/Region
(2025)

Figure 8. Automotive Navigation Map Data Sales Market Share by Country/Region
(2021, 2025 & 2032)

Figure 9. Global Automotive Navigation Map Data Market Size Market Share by Type in 2025

Figure 10. Global Automotive Navigation Map Data Market Size Market Share by
Spatial Representation in 2025

Figure 11. Global Automotive Navigation Map Data Market Size Market Share by
Delivery Architecture in 2025

Figure 12. Automotive Navigation Map Data in Passenger Vehicle

Figure 13. Global Automotive Navigation Map Data Market: Passenger Vehicle
(2021-2026) & (\$ millions)

Figure 14. Automotive Navigation Map Data in Commercial Vehicle

Figure 15. Global Automotive Navigation Map Data Market: Commercial Vehicle
(2021-2026) & (\$ millions)

Figure 16. Global Automotive Navigation Map Data Market Size Market Share by
Application in 2025

Figure 17. Global Automotive Navigation Map Data Revenue Market Share by Player in 2025

Figure 18. Global Automotive Navigation Map Data Market Size Market Share by
Region (2021-2026)

Figure 19. Americas Automotive Navigation Map Data Market Size 2021-2026 (\$
millions)

Figure 20. APAC Automotive Navigation Map Data Market Size 2021-2026 (\$ millions)

Figure 21. Europe Automotive Navigation Map Data Market Size 2021-2026 (\$ millions)

Figure 22. Middle East & Africa Automotive Navigation Map Data Market Size

2021-2026 (\$ millions)

Figure 23. Americas Automotive Navigation Map Data Value Market Share by Country in 2025

Figure 24. United States Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 25. Canada Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 26. Mexico Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 27. Brazil Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 28. APAC Automotive Navigation Map Data Market Size Market Share by Region in 2025

Figure 29. APAC Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

Figure 30. APAC Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

Figure 31. China Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 32. Japan Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 33. South Korea Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 34. Southeast Asia Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 35. India Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 36. Australia Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 37. Europe Automotive Navigation Map Data Market Size Market Share by Country in 2025

Figure 38. Europe Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

Figure 39. Europe Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

Figure 40. Germany Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 41. France Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 42. UK Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 43. Italy Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 44. Russia Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Automotive Navigation Map Data Market Size Market Share by Region (2021-2026)

Figure 46. Middle East & Africa Automotive Navigation Map Data Market Size Market Share by Type (2021-2026)

Figure 47. Middle East & Africa Automotive Navigation Map Data Market Size Market Share by Application (2021-2026)

Figure 48. Egypt Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 49. South Africa Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 50. Israel Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 51. Turkey Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 52. GCC Countries Automotive Navigation Map Data Market Size Growth 2021-2026 (\$ millions)

Figure 53. Americas Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 54. APAC Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 55. Europe Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 56. Middle East & Africa Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 57. United States Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 58. Canada Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 59. Mexico Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 60. Brazil Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 61. China Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 62. Japan Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 63. Korea Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 64. Southeast Asia Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 65. India Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 66. Australia Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 67. Germany Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 68. France Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 69. UK Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 70. Italy Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 71. Russia Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 72. Egypt Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 73. South Africa Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 74. Israel Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 75. Turkey Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

Figure 76. Global Automotive Navigation Map Data Market Size Market Share Forecast by Type (2027-2032)

Figure 77. Global Automotive Navigation Map Data Market Size Market Share Forecast by Application (2027-2032)

Figure 78. GCC Countries Automotive Navigation Map Data Market Size 2027-2032 (\$ millions)

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