

In-Vehicle Infotainment Market Assessment, By Components [High-end DSPs & GPUs, Heads-up Display, Integrated Head-unit, Connectivity Modules, Others], By Application [Navigation, Media, Communication, Others], By Installation [Front Row, Rear Row], By Vehicle Type [Passenger Vehicle, Light Commercial Vehicle, Heavy Commercial Vehicle, Others], By Sales Channel [Original Equipment Manufacturers, Aftermarket], By Region, Opportunities and Forecast, 2016-2030F

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# **Abstracts**

Global in-vehicle infotainment market size was valued at USD 19.2 billion in 2022, and is projected to reach USD 42.3 billion by 2030, growing at a CAGR of 10.3% from 2023 to 2030. The market has flourished over the years with several driving factors such as spike in personal vehicle sales, technological advancements in touch screen, voice recognition, and gesture control. Initially, the in-vehicle infotainment systems were used majorly as a CD music player while other features have been added over time. Furthermore, the consolidation of connected automotive and electronic control unit (ECU) has revolutionized the automotive infotainment systems. However, the industry holds scope for the OEMs and aftermarket players, aligning with different price points.

The market is witnessing an exponential growth as the automotive industry experiences change. New hybrid and electric vehicles are enabling manufacturers to produce transmission-friendly infotainment systems. The popularity of multiple screen systems and transforming instrument cluster is anticipated to garner market growth during the



forecast period. Moreover, the startups are covering AI integration, ADAS systems, and autonomous driving, gaining traction in the industry. Shifting from mobile screens to the AI-driven interface, OEMs focus on making their In-Vehicle Infotainment (IVI) systems more advanced. Though, new startups around EV market are creating advanced infotainments with higher growth than the incumbent OEMs.

#### Technological Advancement and Feature-loaded System Drive the Growth

The advanced infotainment systems, including easy to navigate and integrate modules in high demand. Especially, the middle-range pricing segment is filled with vehicles with smartphone integration like android auto and apple car play. Market giants like Harman are enabling IoT, 5G for enhanced connectivity and easy control. It gives end-users major control over the infotainment unit through their smartphone screens. Automotive giants are adding gesture and voice control features in the premium segment of their cars. The latest addition is the human-machine interface (HMI) that delivers push rotary controllers, speech recognition technology, and gesture functions. The increasing per capita income allows people to buy new cars with fancy entertainment systems. Additional tools and other hardware systems are installed on the dashboard and other corners of the vehicle. It gives a push to the aftermarket component for the distribution channel.

Innovation to Make a Leap in the Market

The line between telematics and in-vehicle infotainment systems diminishes as the IVI units keep on adding wireless communication, GPS, and black box technologies. Companies are focusing on delivering advanced vehicle diagnostics for providing information around any issue. It adds value to the vehicle protection and security landscape. The system monitors brakes, engines, and transmission related systems. Brands are extending their research and development facilities to enhance security rating and identify loopholes. The higher security rating with advanced infotainment units provides an edge in the market competition. The addition of real-time data and navigation makes it easy for the end-users to drive in heavy traffic.

The global automotive market is crossing borders, letting end-users get a cost-effective price range to choose from. Easy mapping, instruction, and assistance are anticipated to garner market growth during the forecast period. Furthermore, cloud technology integrating with infotainment units prevent accidents as it allows vehicles to communicate. For example, BMW's ConnectedDrive feature loads the vehicle with GPS, Cloud technology, and other infotainment services. The increased awareness



around these features is projected to expand the market in the coming years.

Government Initiatives focus on Hands-free Control

Government authorities are advocating minimal hand usage while driving to enhance road safety. Many countries are introducing regulations that emphasize hands-free control, promoting safety and security. Integrated with advanced infotainment units, telematics supports cutting-edge driver-assistance systems (ADAS). Furthermore, ECU consolidation optimizes engine efficiency and performance, displayed through instrument clusters.

The integration of augmented reality into infotainment units provides users with vital information about their surroundings, adding an extra layer of safety. These features in infotainment systems are indirectly encouraged by various government initiatives. The widespread adoption of automotive gesture recognition integrated with infotainment systems is becoming a preferred choice to prevent distraction-related accidents. Authorities offering subsidies for electric vehicles are encouraging manufacturers to expand their research and development efforts related to advanced telematics systems. This concerted effort between government policies and automotive technology advancements is paving the way for safer and more efficient driving experiences.

Front Row Installation to be on the Front

When it comes to installation, the front row takes precedence, primarily because it is the most frequently used area and provides greater control to both the driver and front-row passengers. Infotainment systems offered by OEMs are typically placed in the front row for convenient access. The recent introduction of the SkipGen IVI by Panasonic exemplify the trend by providing front-row Infotainment and In-Vehicle Infotainment (IVI) systems that offer seamless access to voice assistants like Siri and Alexa. Moreover, the front row installations offer effortless connectivity to the Electronic Control Unit (ECU) and other vehicle controls, including cruise control. These features are expected to contribute significantly to the growth of the segment during the forecast period. The emphasis on enhancing the driving experience and accessibility for the driver and front-row occupants underscores the importance of front-row installations in modern automotive infotainment systems.

Authentic Technology and Special Features fuels the OEM Segment

The OEM segment currently takes the lead in terms of market share. This dominant

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position can be attributed to the rising sales of personal vehicles in emerging economies, which attract automotive industry giants to initiate new projects. Consumers often prefer the OEMs infotainment systems that come pre-installed in their vehicles at the time of manufacturing.

Factors including superior performance, guaranteed reliability, and consistent software updates contribute to the growth of the OEM segment. The trust associated with OEM products is the driving force behind their prominence in the market. However, the aftermarket segment is gaining ground and is expected to expand significantly. This growth can be attributed to the relatively high prices of OEM infotainment units. Consumers seeking cost-effective alternatives or upgrading their existing infotainment systems often turn to the aftermarket for more affordable and customizable solutions. The competition between OEM and aftermarket channels reflect diverse preferences and needs of consumers in the infotainment market.

Asia-Pacific Emerging as the Biggest Market

Asia Pacific has emerged as one of the largest automotive markets globally, and the growth is expected to drive higher sales of infotainment systems in the region. The introduction of cutting-edge technologies such as 5G, artificial intelligence (AI), and machine learning significantly enhances in-vehicle infotainment segments. Additionally, rapid economic development, heightened foreign investments, and increased demand for personal vehicles are contributing to the region's prominence. Local automotive brands in Asia Pacific are leveraging technology to create advanced infotainment systems tailored to consumers' evolving preferences. For instance, companies like Tata Elxsi are focusing on innovative solutions like self-parking valet modules that allow vehicles to identify suitable parking spots and execute parking maneuvers autonomously. This demonstrates the region's commitment to incorporate modern technology into automotive systems to enhance user experiences and vehicle capabilities.

#### Impact of COVID-19

The COVID-19 has adversely impacted the automotive market and its components. The pandemic slowed the market growth from shrinking the supply chain efficiency to restricting the research and development programs. During the pandemic, the supply chain of semiconductors disturbed, limiting the production of IVI. The shortage of raw materials, smooth transportation, and lack of demand resulted in limiting the growth rate for the market. The lockdown further stopped the manufacturing units delivering the



expected number of installations. The market is constantly recovering with automotive companies expanding their research and development facilities. The spike in the sales of automobiles in Asian economies, like India and China, are helping the industry in its recovery process.

#### Impact of Russia-Ukraine War

The Russia-Ukraine conflict is adversely impacting the East European automotive markets, primarily due to disruptions in the supply of raw materials essential for auto manufacturing. Restricted transportation of goods from Ukraine is impeding the production of automotive components, including in-vehicle infotainment systems. Moreover, Russia's role as a major supplier, accounting for 33 percent of global palladium supply, is raising concerns. Palladium is a vital component in semiconductor manufacturing, and Russia's increase in palladium prices has reverberated through the supply chain, further affecting the automotive industry.

Key Players Landscape and Outlook

The global market for in-vehicle infotainment systems is characterized by intense competition, as numerous prominent companies compete for a share of the market. These companies have established a robust global presence and provide a diverse product portfolio. Continuously investing in research and development, as they strive to create novel and cutting-edge products. Furthermore, the players are expanding their range of offers to meet the increasing demand for in-vehicle infotainment systems across regions worldwide. The market holds potential for different platforms. The industry delivers opportunity for startups, technology developers, and automotive giants. Companies are focusing on delivering multiple layers of security with an amalgamation of hardware and software-based solutions. The focus is on creating easier interface, gesture tracking, and voice control.

In January 2023, Alpine has styled Carica Van and Havana Crossover for the Tokyo Auto Salon. The company has installed its 11-inch infotainment screen, 12.8-inch display for occupants in rear seats, and 12-inch digital review mirror in Carica.

In March 2023, Qualcomm and Alps Alpine have partnered to produce advanced automotive in-cabin capabilities.

In June 2023, Denso India announced their audio infotainment casing with the utilization of the electro-galvanized steel from American Precoat India.

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