

Automotive Cybersecurity Market by Form (In-Vehicle, External Cloud Services), Offering (Hardware & Software), Security, Vehicle Type, Application, Propulsion, Vehicle Autonomy, Approach, EV Application and Region - Global Forecast to 2028

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Abstracts

The global automotive cybersecurity market size is projected to grow from USD 2.5 billion in 2023 to USD 6.0 billion by 2028, at a CAGR of 18.5%. Rising demand for connected vehicles has increased the electronic content per vehicle. This raised a vehicle's vulnerability against a cyber-attack, which has increased the demand for automotive cybersecurity solutions across the globe. Moreover, the advent of software-defined vehicles and rising sales of electric vehicles are also expected to bolster the revenue growth of the automotive cybersecurity market in the coming years globally. The automotive cybersecurity market, however, is expected to witness a significant boost in the coming years owing to the increase in vehicle production in different countries, the launch of UNECE WP.29 regulation as well as various government regulations that have compelled automotive OEMs to install additional safety systems in vehicles for better safety.

The wireless network security segment is estimated to grow at a higher CAGR during the forecast period

During the forecast period, the wireless network security segment is anticipated to be the fastest-growing security type segment of the global automotive cybersecurity market. This segment will likely witness significant growth in the Asia Pacific region, followed by Europe and North America regions. . This is owing to the incorporation of V2X technology in vehicles and the rising demand for connected vehicles. Wireless network security solutions help to protect respective wireless networks from

unauthorized access attempts. Wireless network security is typically delivered through wireless devices such as wireless switches and wireless routers that encrypt and secure wireless communications. All these factors above are expected to bolster the revenue growth for wireless network security segment of the automotive cybersecurity market during the forecast period.

ADAS & safety system segment is likely to dominate the automotive cybersecurity market during the forecast period

The ADAS & safety segment is expected to have significant growth opportunities in the automotive cybersecurity market during the forecast period. The demand for ADAS is increasing rapidly, particularly in emerging economies such as India and China, driven by improving road safety standards, supporting legislation, and consumer awareness. Several countries in Europe, North America, and Asia Pacific have introduced regulations that mandate incorporating various types of ADAS in passenger cars and commercial vehicles. For instance, from July 2022, European Commission introduced new "Vehicle General Safety Regulation". It introduced a range of mandatory advanced driver assistant systems to improve road safety and enable fully driverless vehicles in the European Union. Therefore, government mandates and increasing awareness of vehicle safety are expected to fuel the demand for ADAS & safety systems. The need for automotive cybersecurity solutions is also anticipated to grow globally rapidly during the forecast period.

Asia Pacific shows high growth potential for automotive cybersecurity market

Asia Pacific is projected to have largest share in the global automotive cybersecurity market during the forecast period. In Asia Pacific region, countries such as China, Japan, and South Korea are expected to take the lead in autonomous driving technology in the coming years. Leading automotive manufacturers in this region, such as Toyota, Honda, and Hyundai, leverage the advantages of safety systems and have made essential safety features a standard across their models. The anticipated rise in the penetration of autonomous vehicles coupled with increasing adoption of ADAS equipped vehicles would also support the growth of the automotive cybersecurity market in Asia Pacific region. This in turn is expected to create opportunities for stakeholders in the automotive cybersecurity ecosystem. All these aforementioned factors are expected to bolster the revenue growth of the automotive cybersecurity market in Asia Pacific region during the forecast period.

In-depth interviews were conducted with CEOs, marketing directors, other innovation

and technology directors, and executives from various key organizations operating in the automotive cybersecurity market. The break-up of the primaries is as follows:

By Company Type: Automotive Cybersecurity Solution Providers – 40%, OEMs – 35%, Tier 1 – 15%, and Tier 2 – 10%,

By Designation: C Level Executives – 23%, Manager – 43%, and Executives – 34%

By Region: Europe – 30%, North America – 25%, Asia Pacific – 25%, and RoW – 20%

The automotive cybersecurity market comprises major manufacturers such as Continental AG (Germany), Robert Bosch GmbH (Germany), Harman International (US), DENSO Corporation (Japan), Aptiv PLC (Ireland), Garrett Motion Inc. (Switzerland), Renesas Electronics Corporation (Japan), Karamba Security (Israel), SafeRide Technologies (Israel), Arilou Technologies (Israel), GuardKnox Cyber Technologies Ltd. (Israel), Upstream Security Ltd. (Israel), etc.

Research Coverage:

The study covers the automotive cybersecurity market across various segments. It aims at estimating the market size and future growth potential of this market across different segments such as application, offering, form type, security type, vehicle type, propulsion type, vehicle autonomy, EV application, and region. The study also includes an in-depth competitive analysis of key market players, their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

This research report categorizes Automotive Cybersecurity Market by Application (Telematics, Communication Systems, ADAS & Safety, Infotainment, Body Control & Comfort, and Powertrain Systems), Form Type (In-Vehicle, and External Cloud Services), Security Type (Application Security, Wireless Network Security, and Endpoint Security), Vehicle Type (Passenger Vehicles, Light Commercial Vehicles, and Heavy Commercial Vehicles), Offering (Hardware, and Software), Vehicle Autonomy (Non-Autonomous Vehicles, Semi-Autonomous Vehicles, and Autonomous Vehicles), Propulsion Type (ICE vehicles and Electric Vehicles), EV Application (Charging Management, Telematics, Battery Management & Powertrain Systems, Infotainment, ADAS & Safety, Communication Systems, and Body Control & Comfort), Approach

(Intrusion Detection System, and Security Operation Center), and Region (Asia Pacific, Europe, North America and Rest of the World).

The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the automotive cybersecurity market. A detailed analysis of the key industry players provides insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the automotive cybersecurity market. Competitive analysis of SMEs/startups in the automotive cybersecurity market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall automotive cybersecurity market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Increased use of electronics per vehicle & growing number of connected cars, rising sales of electric vehicles, significantly growing global automotive V2X market), restraints (High costs of automotive cybersecurity solutions, growing complexity in vehicle electronic system, complex ecosystem with multiple stakeholders), opportunities (Advent of software-defined vehicles, growing cloud-based applications in automotive industry, exceptional technological development in autonomous vehicle space, introduction of electric vehicle wireless battery management system), and challenges (Discrepancies related to pricing strategies among stakeholders, time lag in delivery of cybersecurity updates) influencing the growth of the automotive cybersecurity market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the automotive cybersecurity market

Market Development: Comprehensive information about lucrative markets – the report analyses the automotive cybersecurity market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive cybersecurity market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Continental AG (Germany), Robert Bosch GmbH (Germany), Harman International (US), DENSO Corporation (Japan), and Aptiv PLC (Ireland), among others in the automotive cybersecurity market

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