

Automotive Engineering Services Market by Application, Service Type, Location (In-house, Outsource), Vehicle Type (Passenger Cars, Commercial Vehicles), Nature Type (Body Leasing, Turnkey), Propulsion (ICE, Electric) and Region - Global Forecast to 2028

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Abstracts

The global automotive engineering services market is projected to grow from an estimated USD 153.2 billion in 2022 to USD 243.9 billion by 2028, registering a CAGR of 8.1%. The market will grow for both in-house and outsource services with the rapid setup of new R&D centers by OEMs and AES providers in Asia Pacific and North America. However, the market in Europe is expected to get impacted due to the upcoming recession as well as other ongoing geopolitical situations that are currently affecting the region. OEMs and AES providers have already announced plans to tilt R&D spending towards electrification and advanced automotive technologies such as ADAS, and Connectivity among others. Prototyping and Designing are expected to be the most lucrative components of the automotive engineering services market with rapid design changes expected in the coming years will OEMs around the world planning for an EV shift. The automotive engineering services market is dominated by established players such as Capgemini (France), IAV Automotive Engineering (Germany), Tech Mahindra (India), AKKA Technologies (Belgium), and HCL Technologies (India) and others. They have initiated partnerships to develop their technology and provide best-in-class services to OEMs.

“Automotive Design Segment to grow at the fastest rate during the forecast period”

Growing demand for smart manufacturing and rapid upgrades in automotive design with

the influx of new technologies will lead to a prosperous market for automotive design. The traditional design process is used in the final sketching of the product. The 2D rendering process is crucial to visualize whether the design is feasible or not. Once the design seems practical and feasible, computer-aided design (CAD) is used to make a 3D model. Clay modeling then helps achieve a physical model of the design. The designing of the car can either be done by the internal team of automotive manufacturers or the manufacturer can outsource it. There are many guidelines taken into consideration while designing a vehicle. The process of designing includes identifying the target customers for whom the car is designed, the type of car it should be, the expected cost, and how the car fits into the brand's portfolio. There are various design elements in a car design such as exterior and interior designs. New technologies such as use of metaverse (or XR technologies) in car design, provides methods for rapid designing and simulation for automobiles or separate component design process. Both OEMs and AES providers work with solution providers to develop their product designs virtually before moving with prototyping.

“Outsource segment to grow in demand during the forecast period in the automotive engineering services market”

Outsourcing the automotive engineering services is a way of hiring engineering functions from an external source. Practices such as design, prototyping, system integration, and testing are usually done by outsourcing the services to an external source. Less complex and task-based services are outsourced to service providers in the automotive engineering services market. Major services, such as electrification, vehicle connectivity, ADAS, and safety, are handled by automotive engineering service providers. ADAS features help to enhance safety and reduce accidents. New engineering services have also come into the picture after the implementation of safety regulations by the European Union. Upcoming vehicles must pass the new safety standards to maintain the safety of the occupant. The increasing requirements for testing and validation would drive the demand for outsourcing. The outsourcing of automotive engineering services can help automotive OEMs by integrating product development with related operations such as engineering and warranty management. It can also help OEMs to gain access to skilled workers who are familiar with current indigenous trends. For instance, companies like HARMAN International, Ricardo, Tech Mahindra, Capgemini, and AVL, among others, provide outsourcing services such as body engineering, powertrain engineering, chassis engineering, and car electronics to various OEMs and automakers.

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

and technology directors, and executives from various key organizations operating in this market.

By Company Type: Tier I – 67%, Tier II and Tier III – 9%, and OEMs – 24%

By Designation: CXOs – 33%, Managers – 52%, Executives – 15%

By Region: North America – 28%, Europe – 34%, Asia Oceania – 38%

The automotive engineering services market is dominated by established players such as Capgemini (France), IAV Automotive Engineering (Germany), Tech Mahindra (India), AKKA Technologies (Belgium), and HCL Technologies (India) and others. They have worked on providing engineering services for the automotive OEMs in the ecosystem. They have initiated partnerships to develop their technology and offer best-in-class products to OEMs.

Research Coverage:

The report covers the automotive engineering services market based on Application, Location, Vehicle Type, Service, Propulsion, Nature Type and Region (North America, Europe, Asia Pacific and Rest of the World). It covers the competitive landscape and company profiles of the major players in the automotive engineering services ecosystem.

The study also includes an in-depth competitive analysis of the key market players, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

This report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the overall automotive engineering services ecosystem and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies.

This report will also help stakeholders understand the market's pulse and provide information on key market drivers, restraints, challenges, and opportunities.

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