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Automotive HMI Market by Product (Voice & Gesture Recognition, Touch Screen & Instrument Cluster Display, Steering Mounted Control, Multifunction Switch), Access, Technology, Display Size (10”), Vehicle Type & Region - Global Forecast to 2028

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Abstracts

The automotive HMI market is projected to grow from USD 23.9 billion in 2023 to USD 40.2 billion by 2028, at a CAGR of 11.0% from 2023 to 2028. The rising demand for luxury passenger cars, the increase in adoption of features in mid-priced cars, and growing awareness for driver safety with r convenience and safety features are the driving factors for the growth of the automotive HMI market.

“Passenger Car segment is predicted to lead the automotive HMI market during the forecast period.”

The passenger car segment would lead the automotive HMI market owing to the large share of passenger cars in total vehicle production in 2022, with >75%. Factors driving the demand for automotive HMI in luxury passenger cars include the increasing demand for in-vehicle features like integrating advanced technologies and connectivity options. Consumers now expect their vehicles to have smartphone integration, voice commands, multimedia capabilities, and interactive touch screens. Apart from this, the customer preference for enhanced user experience, connectivity options, advanced technologies, and safety features like driver monitoring and voice recognition for easy operations in the vehicle during driving, even in mid-priced passenger cars, is driving the growth of the automotive HMI market. OEMs have started offering automotive HMI features like small display screens, digital instrument cluster, and steering mounted controls even in economy-priced passenger cars to gain a competitive edge and attract customer attention. Thus, the trend for offering multiple HMI features in the passenger cars

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segment by OEMs would further drive the growth of the automotive HMI market during the coming years.

“The visual interface technology segment is projected to dominate the market.”

The automotive HMI market is projected to grow substantially in the coming years, propelled by the increasing adoption of visual interface technologies such as central touch screens, head-up displays, instrument cluster displays, and rear seat entertainment display screens. These technologies are predicted to have a market share of >55% in 2023 and provide users with enhanced experiences through intuitive and user-friendly interfaces. They offer advanced functionalities like navigation, media playback, and smartphone integration, improving drivers' and passengers' convenience and satisfaction. Furthermore, integrating visual interface technologies enhances safety by minimizing driver distraction and streamlining controls. Moreover, it contributes to vehicles' overall aesthetics and interior design, catering to consumers' preferences for visually appealing cabin environments. With the rising demand for intuitive interfaces and advanced features, the automotive HMI market is poised for continuous growth as automakers strive to meet evolving customer expectations and gain a competitive advantage.

“North America is another prominent largest market for automotive HMIs.”

North America is one of the dominant markets in the automotive HMI industry as US and Canada have a higher demand for mid-size & large-size SUVs and pick-up trucks. The market growth is mainly attributed to a strong economic position, higher disposable income levels, consumer acceptance of advanced technologies, and the presence of prominent OEMs (Ford Motor Company, General Motors, Tesla) and HMI solution providers. Further, strong telecom infrastructure and various options drive the demand for connectivity and infotainment features in vehicles. Integration with smartphones, media streaming, navigation systems, and voice commands are key developments that enhance the overall regional HMI experience. Additionally, stringent safety regulations related to ADAS and other safety features could be operated and monitored with the help of various automotive HMI systems. Thus, with consumers’ willingness to invest in vehicles equipped with advanced features and technologies and premium automakers' priority to introduce innovative HMI solutions, the market is anticipated to grow in the region.

The break-up of the profile of primary participants in the automotive HMI market:

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By Company Type: Tier 1 – 66%, Tier 2 –23 %, and Others – 11%

By Designation: Others – 45%, C Level – 33%, and Director Level – 21%

By Region: Europe – 62%, Asia Pacific – 27%, and North America – 11%

Prominent companies include Continental AG (Germany), Luxoft (Switzerland), Aptiv (Ireland), HARMAN International (US), Synaptics Incorporated (US), and Visteon Corporation (US), among others.

Research Coverage:

This research report categorizes the automotive HMI market by Product (Voice Recognition System, Rotary Controllers, Gesture Recognition, Touch Screen Display, Instrument Cluster Display, Head-Up Display, Steering Mounted Control System, Multifunction Switches), Technology (Visual Interface, Acoustic Interface, Other Interface Technologies), Access Type (Standard HMI, Multimodal HMI), Vehicle Type (Passenger Cars, Light Commercial Vehicles), Display Size (10”) and Region (Asia Pacific, North America, Europe, and the 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 HMI market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, recession impact, and recent developments associated with the automotive HMI market. This report covers the competitive analysis of upcoming startups in the automotive HMI market ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall automotive HMI market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and 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:

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Analysis of key drivers (Need of golf carts and street legal vehicle with autonomous technology for the geriatric population for their daily commute, increasing popularity of golf sports with increase in number of golf courses in US and Asia Pacific region, and increase in charging infrastructure), restraints (High cost of LSVs has lower sales of the vehicles in developing and underdeveloped countries), opportunities (Increase in infrastructure development in real estate, hotel and resort, and rehabilitation in other European countries for the families of Ukraine after Russia war, increase in autonomous vehicle and connected car technology for better experience of the LSV riders, and increase in global tourism sector which has reached to pre pandemic situation), and challenges (Adoption of lithium ion batteries with high density has increased the battery cost compared to lead acid battery, and lack of safety standards followed by the OEMs with LSV body structure design) are influencing the growth of the LSV market.

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

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

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

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Continental AG (Germany), Luxoft (Switzerland), Aptiv (Ireland), HARMAN International (US), Synaptics Incorporated (US), Visteon Corporation (US) among others in the automotive HMI market

The report also helps stakeholders understand the pulse of the automotive HMI market by product type, including Voice Recognition Systems, Rotary Controllers, Gesture Recognition, Touch Screen Displays, Instrument Cluster Displays, Head-Up Displays, Steering Mounted Control Systems, and Multifunction Switches used in automotive HMI market by providing them with information on key market drivers, restraints, challenges, and opportunities.

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