

Automotive Operating System Market by OS Type (QNX, Android, Linux, Windows), ICE Vehicle Type (PCs, LCVs, and HCVs), EV Application (Battery Management and Charging Management), Application and Region - Global Forecast to 2030

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Abstracts

The global automotive operating system market is projected to grow from USD 12.7 billion in 2022 to USD 25.8 billion by 2030, at a CAGR of 9.2%. Parameters such as increased demand for premium vehicles, along with growing advancement in infotainment systems are expected to bolster the revenue growth of the automotive operating system market during the forecast period. In addition, increasing sales of electric vehicles, paired with increasing focus inclination towards software-defined vehicles will create new opportunities for automotive operating system market during the forecast period.

“ADAS & safety system segment is expected to be the largest market during the forecast period, by application.”

The ADAS & safety systems segment has the largest market share among all the applications in the automotive operating system market. According to primary inputs, ADAS & safety systems have higher penetration rates in North America and Europe due to the improved infrastructure and strong government mandates towards safety systems in these regions. Government mandates and increasing awareness about vehicle safety are expected to fuel the demand for ADAS & safety systems across the globe. The implementation of regulations regarding the safety of vehicles, such as the UN Regulation on Advanced Emergency Braking Systems (AEBS) for cars, is expected to significantly improve road safety. The regulation has laid down technical requirements for the approval of vehicle-to-vehicle (V2V) and vehicle-to-pedestrian AEBS fitted on

cars. Furthermore, in March 2022, the National Highway Traffic Safety Administration (NHTSA) issued a final rule amending the Federal Motor Vehicle Safety Standards for accounting vehicles equipped with automated driving systems. The rule is limited to crashworthiness standards.

“North America is expected to have significant growth during the forecast period.”

The North American region is expected to have significant growth during the forecast period. The countries considered for the North American region include the US, Canada, and Mexico. The North American automotive industry is one of the most advanced in the world. The North American Free Trade Agreement (NAFTA) has fostered the growth of the automotive industry in the region. Home to the big three—Ford Motors, General Motors, and Fiat Chrysler Automobiles, the automotive market in the US has favored passenger cars with advanced comfort and safety technologies. The consistent increase in the sales of luxury vehicles is likely to positively impact the demand for self-driving cars in North America. The large customer base and high disposable income levels in the region have fueled the demand for premium passenger cars. The increasing demand for autonomous driving and cruise control in premium vehicles would boost the market for automotive operating systems in this region.

“Linux segment is estimated to be the promising segment in the automotive operating system market during the forecast period”

Linux is expected to be the promising segment by operating system type during the forecast period. Linux is estimated to maintain its market position and witness steady growth in the automotive operating system market. Key automobile players using Linux include Baidu Inc. (China), Lyft (US), Mercedes-Benz (Germany), Honda Motor Co., Ltd. (Japan), Chevrolet (US), Toyota Motor Corporation (Japan), Volkswagen Group (Germany), General Motors (US), and BMW AG (Germany). As per automotive experts, automotive manufacturers/OEMs will be running Linux-based OS on several applications, such as engine-control units, instrument clusters, embedded telematics systems, and Advanced Driver-Assistance Systems (ADAS), in the near future. In May 2022, General Motors (US) collaborated with Red Hat Inc. (US), which is a well-known Linux company, to work on vehicle operating systems. With this collaboration, both companies intend to bring the era of open source to the automotive world, benefiting automotive manufacturers, ecosystem partners, and consumers, among others. All the aforementioned factors are expected to drive the demand for Linux-based operating systems 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 this market.

By Company Type: OEMs - 21%, Tier I - 31%, and Tier II - 48%

By Designation: CXOs - 40%, Directors - 35%, and Others - 25%

By Region: North America - 30%, Europe - 50%, Asia Pacific - 15%, and Rest of the World - 5%

The automotive operating system market is dominated by major players including BlackBerry Limited (Canada), Automotive Grade Linux (US), Microsoft Corporation (US), Apple Inc. (US), and Alphabet Inc. (US). These companies have strong product portfolio as well as strong distribution networks at the global level.

Research Coverage:

The report covers the automotive operating system market, in terms of Operating System Type (QNX, Linux, Windows, Android, and Others), ICE Vehicle Type (Passenger Cars, Light Commercial Vehicles and Heavy Commercial Vehicles), EV Application (Charging Management Systems, and Battery Management Systems), Application (ADAS & Safety Systems, Autonomous Driving, Body Control & Comfort Systems, Communication Systems, Connected Services, Infotainment Systems, Engine Management & Powertrain, and Vehicle Management & Telematics) and Region (Asia Pacific, Europe, North America, Latin America, and Rest of the World). It covers the competitive landscape and company profiles of the major players in the automotive operating system market ecosystem.

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

Key Benefits of Buying the Report:

The report will help market leaders/new entrants in this market with information on the closest approximations of revenue numbers for the overall automotive operating system market 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.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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