

In-vehicle Infotainment Market by Component (Display Unit, Control Panel, TCU, HUD), OS (Linux, QNX, MS), Service (Entertainment, Navigation, e-Call, Diagnostic), Connectivity, Form, Display Size, Location, Vehicle Type Region - Global Forecast to 2028

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Abstracts

The in-vehicle infotainment market is projected to grow from USD 18.8 billion in 2023 to USD 31.4 billion by 2028, at a CAGR of 10.9%. Increasing demand for luxury vehicles enabled with connectivity & safety solutions, a rise in customer preference for enhanced in-cabin experience with options for various entertainment services at affordable cost, and government mandates would fuel the growth for in-vehicle infotainment systems. Also, the growing premium electric and hybrid vehicle range in China, Europe, and North American countries would boost the development of the in-vehicle infotainment market in the coming years.

“The display unit/infotainment unit segment is expected to lead the component segment.”

During the forecast period, the infotainment unit is expected to lead the in-vehicle infotainment market under the components segment. These front infotainment touchscreens provide a user-friendly interface, allowing drivers and passengers to easily access and control various vehicle functions and settings. The convenience, interactivity, and intuitive navigation central touch screens offer significantly enhance the overall user experience. The display screen size of the infotainment varies based on vehicle class. For instance, entry-level car display unit ranges from 3–5”, whereas most mid-segment cars have an average screen size of 8-10”.

Nowadays new SUVs are incomplete without an all-encompassing infotainment system, the demand for SUVs is rising, hence rising the in-vehicle infotainment system market. SUVs offer some pretty impressive infotainment systems for instance, Lincoln Navigator has one of the most impressive infotainment systems is capable of wireless Android Auto and Apple CarPlay integration with a 13.2-inch touchscreen, has easy-to-read graphics and organizes apps and notifications perfectly. The car sound system in the Lincoln SUV is a 14-speaker Revel stereo system which can be modified up to a 28-speaker Revel Ultima 3D system. Hyundai TUCSON comes with an 8.8-inch touchscreen with the option to make it a 10.3-inch display which is integrated into the dash. Therefore, the rapid advancement in in-car technology has resulted in manufacturers offering bigger and bigger infotainment screens which will create futuristic opportunities for the growth of the in-vehicle infotainment market in the upcoming years.

Thus, automotive OEMs are increasing the mass offering of infotainment systems irrespective of vehicle class along with rising integration of advanced features like navigation, media playback, weather update, route planning, smartphone connectivity, etc., which would continue to fuel the market demand for the infotainment system.

“Passenger Cars are estimated to be the largest and fastest-growing segment for in-vehicle infotainment systems during the forecast period.”

The passenger car segment would lead and will also grow at the fastest pace for the in-vehicle infotainment system market. This is mainly due to the large share of passenger cars in total vehicle production in 2022, with more than 75%. Factors driving the demand for the in-vehicle infotainment system is the rising adoption of front infotainment units in lower-range cars, mainly in developing countries such as China and India. OEMs have started offering features like small display screens, digital instrument clusters, and HUD even in some economy and mid-priced passenger cars to gain a competitive edge and attract customer attention. Additionally, growing luxury vehicle sales and demand for screens for rear passengers to offer a more personalized experience and comfort are factors expected to fuel the rear-row in-vehicle infotainment system market during the forecast period. The emergence of 5G is also expected to contribute to developing the in-vehicle infotainment market. Hence the in-vehicle infotainment system market is expected to grow significantly.

“North America is the second largest market for in-vehicle infotainment market.”

North America is one of the dominant markets in the in-vehicle infotainment market 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 solid economic position, higher disposable income levels, consumer acceptance of advanced technologies, and the presence of prominent OEMs (Ford Motor Company, General Motors, Tesla) and infotainment system providers. Further, robust telecom infrastructure and various options drive vehicles' demand for connectivity and infotainment features. Integration with smartphones, media streaming, navigation systems, and voice commands are key developments that enhance the overall regional consumer experience.

The market growth in North America is expected to be driven by stringent safety regulations. The US National Highway Traffic Safety Administration (NHTSA) and the Insurance Institute for Highway Safety (IIHS) made automatic emergency braking (AEB) a standard for vehicles in 2022. Thus, with the increased adoption of safety features in vehicles, the demand for in-vehicle infotainment systems will rise. ADAS features have a higher adoption rate in these regions, owing to the demand for premium EVs which are offered with these ADAS features. For instance, the Mercedes-Benz GLC series, Ford F-150 Lightning, Volkswagen ID.5, Citroen C5 X, Ioniq 6, Toyota Harrier PHEV, Mazda CX-60 PHEV, BMW i7 xDrive 60, etc. some models offered with the ADAS feature which is surging the demand of in-vehicle infotainment system in the upcoming years.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.

By Company Type: In-vehicle infotainment suppliers – 45%, automotive OEMs-35%, and Others– 20%

By Designation: C Level - 35%, Directors- 35%, and Others – 30%

By Region: Asia Pacific - 40%, Europe - 30%, and North America –30%

The in-vehicle Infotainment market is led by established players such as Harman International (US), Panasonic Corporation (Japan), Alps Alpine Co Ltd (Japan), Robert Bosch GmbH (Germany), and Continental AG (Germany).

Research Coverage:

In-vehicle Infotainment Market by Component (Display Unit, Control Panel, TCU, HUD), OS (Linux, QNX, MS), Serv...

The study segments the In-vehicle infotainment market and forecasts the market size based on Vehicle Type {Passenger Car, Light Commercial Vehicle (LCV), and Heavy Commercial Vehicle (HCV)}, Component (Infotainment/Display Unit, Control Panel, Telematics Control Unit, and Head-Up Display), Operating System (Android, Linux, QNX, Microsoft, and Others), Services (Entertainment Services, Navigation Services, E-call, Vehicle Diagnostics, and Others), Location (Front Row and Rear Row), Connectivity (3G/4G and 5G), Form (Embedded, Tethered, and Integrated), Display Size (\$\$\$5", 5"-10", \$\$\$\$10"), Retrofit, By Vehicle Type (Passenger Cars and Commercial Vehicles), Electric Vehicle, By Vehicle Type (Battery Electric vehicle, Plug-in Hybrid Electric Vehicle, and Fuel-Cell Electric Vehicle), and region (Asia Pacific, North America, Europe, and the Rest of the World [RoW]).

The study also includes an in-depth competitive analysis of the significant In-vehicle infotainment manufacturers, 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 the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall In-vehicle infotainment market and the sub-segments. 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's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of Key drivers (Growth in entertainment, safety and security & navigation services, growing demand for rear seat infotainment are primarily driving the sales of in vehicle infotainment system), Restraint (Additional cost of annual subscription of infotainment system may threaten the growth of overall market), opportunities (Government mandates on telematics, e-call, and other safety related services will create ample of opportunities for the overall market growth) and challenges (Despite of major developments, cybersecurity remains a major challenge to be tackled as the components included in in vehicle infotainment like hardware, software, mobile apps, and Bluetooth are vulnerable to cyberattacks) influencing the growth of in vehicle infotainment market.

Product Development/Innovation: Detailed insights on upcoming technologies, research development activities, and new product & services of In vehicle infotainment market

Market Development: Comprehensive information about lucrative market – the report analyzes the in vehicle infotainment market across varied regions

Market Diversification: Exhaustive information about new products & services , untapped geographies, recent development and investment in the in vehicle infotainment market

Competitive Assessment: In depth assessment of market shares, growth strategies and service offerings of leading players like HARMAN INTERNATIONAL (US), PANASONIC CORPORATION (JAPAN), ALPS ALPINE Co. Ltd (JAPAN), Robert Bosch GmbH (GERMANY), Continental AG (GERMANY) among others in in-vehicle infotainment market.

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