

Automotive Connectivity Market Forecasts to 2034 – Global Analysis By Connectivity Type (Embedded Connectivity, Integrated Connectivity, and Tethered Connectivity), Network Type, Technology, Communication Type, Hardware, End User and By Geography

<https://marketpublishers.com/r/AE777977E323EN.html>

Date: July 2026

Pages: 0

Price: US\$ 4,150.00 (Single User License)

ID: AE777977E323EN

Abstracts

According to Statistics MRC, the Global Automotive Connectivity Market is accounted for \$34.5 billion in 2026 and is expected to reach \$99.4 billion by 2034, growing at a CAGR of 14.1% during the forecast period. Automotive connectivity refers to the integration of communication technologies into vehicles, enabling seamless data exchange between vehicles, infrastructure, networks, and external devices. This connectivity encompasses various technologies including telematics, cellular networks, Wi-Fi, Bluetooth, and vehicle-to-everything communication systems. Modern connected vehicles leverage embedded, integrated, or tethered connectivity solutions to enable features such as real-time navigation, remote diagnostics, over-the-air updates, and advanced driver assistance systems.

Market Dynamics:

Driver:

Growing demand for connected services and autonomous driving features

The increasing consumer demand for connected services and the advancement of autonomous driving technologies serve as primary catalysts for the automotive connectivity market. Modern vehicle buyers expect seamless connectivity for navigation,

entertainment, remote access, and safety features. The development of autonomous vehicles requires robust, low-latency connectivity for sensor data sharing, real-time decision making, and vehicle-to-everything communication. Additionally, over-the-air update capabilities enabled by connectivity allow automakers to continuously improve vehicle functionality and address software issues remotely. As connected services become standard across vehicle segments, the demand for advanced connectivity solutions continues to accelerate.

Restraint:

High implementation costs and infrastructure challenges

The automotive connectivity market faces significant challenges from high implementation costs and infrastructure limitations. Integrating advanced connectivity solutions requires substantial investment in hardware components including telematics control units, antennas, communication modules, and embedded SIMs. The development and validation of connectivity software platforms add to development costs. Additionally, the availability and reliability of network infrastructure, particularly 5G coverage, varies significantly across regions, limiting connectivity capabilities in certain areas. The need for continuous software updates and cybersecurity measures further increases operational costs. These infrastructure and cost challenges can slow adoption, particularly in developing markets with limited network coverage.

Opportunity:

Growth of 5G networks and cellular vehicle-to-everything technology

The global expansion of 5G networks and the advancement of cellular vehicle-to-everything technology present significant opportunities for automotive connectivity providers. 5G offers ultra-low latency, high bandwidth, and massive device connectivity essential for autonomous driving and real-time vehicle communication. C-V2X enables direct communication between vehicles, infrastructure, and pedestrians, enhancing safety and traffic efficiency. The deployment of 5G networks worldwide creates the infrastructure foundation for advanced connected vehicle applications. As 5G coverage expands and C-V2X technology matures, automakers can develop innovative connected services and autonomous driving capabilities that leverage these advanced communication technologies.

Threat:

Cybersecurity vulnerabilities and data privacy concerns

The automotive connectivity market faces significant threats from cybersecurity vulnerabilities and data privacy concerns that can impact consumer trust and regulatory compliance. Connected vehicles generate and transmit vast amounts of sensitive data, including location information, driving behavior, and personal identifiable information. Cyberattacks targeting vehicle communication systems could compromise safety functions, enable unauthorized access, or facilitate data breaches. Ensuring robust security measures across the connectivity ecosystem requires substantial investment and continuous vigilance. Additionally, compliance with evolving data protection regulations such as GDPR and CCPA presents ongoing challenges. These security and privacy concerns represent persistent threats to market growth.

Covid-19 Impact:

The COVID-19 pandemic initially caused disruption to the automotive connectivity market through production shutdowns and reduced vehicle demand. However, the crisis accelerated the adoption of connected vehicle technologies as consumers and businesses increasingly relied on digital services. The emphasis on contactless operations, remote diagnostics, and over-the-air updates highlighted the value of connectivity solutions. Fleet operators sought connectivity-enabled solutions for vehicle tracking, driver safety, and operational efficiency during the pandemic. As automotive production recovered, the focus on connected services intensified, supporting continued market growth. The pandemic effectively underscored the importance of connectivity for vehicle safety, convenience, and operational resilience.

The embedded connectivity segment is expected to be the largest during the forecast period

The embedded connectivity segment is expected to account for the largest market share during the forecast period, driven by its superior reliability, security, and seamless integration capabilities compared to other connectivity types. Embedded connectivity utilizes built-in hardware and modules that are factory-installed in vehicles, ensuring consistent and reliable connectivity regardless of driver behavior. As automakers increasingly prioritize secure and reliable connectivity for advanced features, embedded solutions remain the preferred choice for ensuring consistent vehicle connectivity.

The 5G segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the 5G segment is predicted to witness the highest growth rate, driven by its transformative capabilities including ultra-low latency, high bandwidth, and massive device connectivity essential for next-generation automotive applications. 5G enables advanced features such as real-time autonomous driving, enhanced V2X communication, and high-definition streaming services. The global deployment of 5G networks and increasing availability of 5G-enabled vehicles support segment growth. The long-term potential of 5G for enabling software-defined vehicles and autonomous driving further drives adoption.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, driven by the presence of major technology companies, advanced telecommunications infrastructure, and high adoption rates of connected vehicle technologies. The region's significant investment in 5G network deployment supports automotive connectivity applications. Major automotive OEMs and technology companies in the United States are early adopters of advanced connectivity solutions for infotainment, telematics, and autonomous driving.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, fueled by rapid automotive industry expansion, large-scale 5G network deployment, and growing investment in connected vehicle technologies across countries like China, Japan, South Korea, and India. The region's large automotive manufacturing base and technology-driven mobility solutions create substantial demand for connectivity solutions. The growing consumer demand for connected services and increasing vehicle ownership rates accelerate connectivity adoption across the region.

Key players in the market

Some of the key players in Automotive Connectivity Market include Aptiv PLC, Robert Bosch GmbH, Continental AG, DENSO Corporation, Valeo SA, Harman International Industries Inc., Qualcomm Technologies Inc., NXP Semiconductors N.V., LG Electronics Inc., Marelli Holdings Co., Ltd., Hyundai Mobis Co., Ltd., Lear Corporation, Ericsson AB, Huawei Technologies Co., Ltd., and Quectel Wireless Solutions Co., Ltd.

Key Developments:

In March 2025, Qualcomm Technologies announced a new generation of automotive connectivity chipsets featuring integrated 5G and C-V2X capabilities. The chipset enables ultra-low latency communication essential for autonomous driving and advanced safety features while supporting seamless connectivity across vehicle systems.

In February 2025, Harman International introduced a new connectivity platform designed for software-defined vehicles. The platform integrates embedded connectivity, over-the-air update capabilities, and advanced cybersecurity features to support the evolving needs of connected vehicle ecosystems.

Connectivity Types Covered:

Embedded Connectivity

Integrated Connectivity

Tethered Connectivity

Network Types Covered:

3G

4G/LTE

5G

Satellite Connectivity

Dedicated Short-Range Communications (DSRC)

Cellular Vehicle-to-Everything (C-V2X)

Technologies Covered:

Bluetooth

Wi-Fi

Near Field Communication (NFC)

Ultra-Wideband (UWB)

Cellular Connectivity

Ethernet

Telematics

Communication Types Covered:

Vehicle-to-Vehicle (V2V)

Vehicle-to-Infrastructure (V2I)

Vehicle-to-Pedestrian (V2P)

Vehicle-to-Network (V2N)

Vehicle-to-Cloud (V2C)

Vehicle-to-Everything (V2X)

Hardware Components Covered:

Telematics Control Unit (TCU)

Connectivity Control Unit (CCU)

Antennas

Communication Modules

Gateways

Embedded SIM (eSIM)

End Users Covered:

Individual Vehicle Owners

Fleet Operators

Mobility-as-a-Service (MaaS) Providers

Automotive OEMs

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

2 RESEARCH FRAMEWORK

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
 - 2.4.1 Data Collection (Primary and Secondary)
 - 2.4.2 Data Modeling and Estimation Techniques
 - 2.4.3 Data Validation and Triangulation
 - 2.4.4 Analytical and Forecasting Approach

3 MARKET DYNAMICS AND TREND ANALYSIS

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

4 COMPETITIVE AND STRATEGIC ASSESSMENT

- 4.1 Porter's Five Forces Analysis
 - 4.1.1 Supplier Bargaining Power
 - 4.1.2 Buyer Bargaining Power
 - 4.1.3 Threat of Substitutes
 - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

5 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY CONNECTIVITY TYPE

- 5.1 Embedded Connectivity
- 5.2 Integrated Connectivity
- 5.3 Tethered Connectivity

6 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY NETWORK TYPE

- 6.1 3G
- 6.2 4G/LTE
- 6.3 5G
- 6.4 Satellite Connectivity
- 6.5 Dedicated Short-Range Communications (DSRC)
- 6.6 Cellular Vehicle-to-Everything (C-V2X)

7 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY TECHNOLOGY

- 7.1 Bluetooth
- 7.2 Wi-Fi
- 7.3 Near Field Communication (NFC)
- 7.4 Ultra-Wideband (UWB)
- 7.5 Cellular Connectivity
- 7.6 Ethernet
- 7.7 Telematics

8 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY COMMUNICATION TYPE

- 8.1 Vehicle-to-Vehicle (V2V)
- 8.2 Vehicle-to-Infrastructure (V2I)
- 8.3 Vehicle-to-Pedestrian (V2P)
- 8.4 Vehicle-to-Network (V2N)
- 8.5 Vehicle-to-Cloud (V2C)
- 8.6 Vehicle-to-Everything (V2X)

9 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY HARDWARE

- 9.1 Telematics Control Unit (TCU)
- 9.2 Connectivity Control Unit (CCU)
- 9.3 Antennas
- 9.4 Communication Modules
- 9.5 Gateways
- 9.6 Embedded SIM (eSIM)

10 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY END USER

- 10.1 Individual Vehicle Owners
- 10.2 Fleet Operators
- 10.3 Mobility-as-a-Service (MaaS) Providers
- 10.4 Automotive OEMs

11 GLOBAL AUTOMOTIVE CONNECTIVITY MARKET, BY GEOGRAPHY

- 11.1 North America
 - 11.1.1 United States
 - 11.1.2 Canada
 - 11.1.3 Mexico
- 11.2 Europe
 - 11.2.1 United Kingdom
 - 11.2.2 Germany
 - 11.2.3 France
 - 11.2.4 Italy
 - 11.2.5 Spain
 - 11.2.6 Netherlands
 - 11.2.7 Belgium
 - 11.2.8 Sweden
 - 11.2.9 Switzerland
 - 11.2.10 Poland
 - 11.2.11 Rest of Europe
- 11.3 Asia Pacific
 - 11.3.1 China
 - 11.3.2 Japan
 - 11.3.3 India
 - 11.3.4 South Korea
 - 11.3.5 Australia

- 11.3.6 Indonesia
- 11.3.7 Thailand
- 11.3.8 Malaysia
- 11.3.9 Singapore
- 11.3.10 Vietnam
- 11.3.11 Rest of Asia Pacific
- 11.4 South America
 - 11.4.1 Brazil
 - 11.4.2 Argentina
 - 11.4.3 Colombia
 - 11.4.4 Chile
 - 11.4.5 Peru
 - 11.4.6 Rest of South America
- 11.5 Rest of the World (RoW)
 - 11.5.1 Middle East
 - 11.5.1.1 Saudi Arabia
 - 11.5.1.2 United Arab Emirates
 - 11.5.1.3 Qatar
 - 11.5.1.4 Israel
 - 11.5.1.5 Rest of Middle East
 - 11.5.2 Africa
 - 11.5.2.1 South Africa
 - 11.5.2.2 Egypt
 - 11.5.2.3 Morocco
 - 11.5.2.4 Rest of Africa

12 STRATEGIC MARKET INTELLIGENCE

- 12.1 Industry Value Network and Supply Chain Assessment
- 12.2 White-Space and Opportunity Mapping
- 12.3 Product Evolution and Market Life Cycle Analysis
- 12.4 Channel, Distributor, and Go-to-Market Assessment

13 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

- 13.1 Mergers and Acquisitions
- 13.2 Partnerships, Alliances, and Joint Ventures
- 13.3 New Product Launches and Certifications
- 13.4 Capacity Expansion and Investments

13.5 Other Strategic Initiatives

14 COMPANY PROFILES

14.1 Aptiv PLC

14.2 Robert Bosch GmbH

14.3 Continental AG

14.4 DENSO Corporation

14.5 Valeo SA

14.6 Harman International Industries, Inc.

14.7 Qualcomm Technologies, Inc.

14.8 NXP Semiconductors N.V.

14.9 LG Electronics Inc.

14.10 Marelli Holdings Co., Ltd.

14.11 Hyundai Mobis Co., Ltd.

14.12 Lear Corporation

14.13 Ericsson AB

14.14 Huawei Technologies Co., Ltd.

14.15 Quectel Wireless Solutions Co., Ltd.

List Of Tables

LIST OF TABLES

Table 1 Global Automotive Connectivity Market Outlook, By Region (2023-2034) (\$MN)

Table 2 Global Automotive Connectivity Market Outlook, By Connectivity Type (2023-2034) (\$MN)

Table 3 Global Automotive Connectivity Market Outlook, By Embedded Connectivity (2023-2034) (\$MN)

Table 4 Global Automotive Connectivity Market Outlook, By Integrated Connectivity (2023-2034) (\$MN)

Table 5 Global Automotive Connectivity Market Outlook, By Tethered Connectivity (2023-2034) (\$MN)

Table 6 Global Automotive Connectivity Market Outlook, By Network Type (2023-2034) (\$MN)

Table 7 Global Automotive Connectivity Market Outlook, By 3G (2023-2034) (\$MN)

Table 8 Global Automotive Connectivity Market Outlook, By 4G/LTE (2023-2034) (\$MN)

Table 9 Global Automotive Connectivity Market Outlook, By 5G (2023-2034) (\$MN)

Table 10 Global Automotive Connectivity Market Outlook, By Satellite Connectivity (2023-2034) (\$MN)

Table 11 Global Automotive Connectivity Market Outlook, By Dedicated Short-Range Communications (DSRC) (2023-2034) (\$MN)

Table 12 Global Automotive Connectivity Market Outlook, By Cellular Vehicle-to-Everything (C-V2X) (2023-2034) (\$MN)

Table 13 Global Automotive Connectivity Market Outlook, By Technology (2023-2034) (\$MN)

Table 14 Global Automotive Connectivity Market Outlook, By Bluetooth (2023-2034) (\$MN)

Table 15 Global Automotive Connectivity Market Outlook, By Wi-Fi (2023-2034) (\$MN)

Table 16 Global Automotive Connectivity Market Outlook, By Near Field Communication (NFC) (2023-2034) (\$MN)

Table 17 Global Automotive Connectivity Market Outlook, By Ultra-Wideband (UWB) (2023-2034) (\$MN)

Table 18 Global Automotive Connectivity Market Outlook, By Cellular Connectivity (2023-2034) (\$MN)

Table 19 Global Automotive Connectivity Market Outlook, By Ethernet (2023-2034) (\$MN)

Table 20 Global Automotive Connectivity Market Outlook, By Telematics (2023-2034) (\$MN)

Table 21 Global Automotive Connectivity Market Outlook, By Communication Type (2023-2034) (\$MN)

Table 22 Global Automotive Connectivity Market Outlook, By Vehicle-to-Vehicle (V2V) (2023-2034) (\$MN)

Table 23 Global Automotive Connectivity Market Outlook, By Vehicle-to-Infrastructure (V2I) (2023-2034) (\$MN)

Table 24 Global Automotive Connectivity Market Outlook, By Vehicle-to-Pedestrian (V2P) (2023-2034) (\$MN)

Table 25 Global Automotive Connectivity Market Outlook, By Vehicle-to-Network (V2N) (2023-2034) (\$MN)

Table 26 Global Automotive Connectivity Market Outlook, By Vehicle-to-Cloud (V2C) (2023-2034) (\$MN)

Table 27 Global Automotive Connectivity Market Outlook, By Vehicle-to-Everything (V2X) (2023-2034) (\$MN)

Table 28 Global Automotive Connectivity Market Outlook, By Hardware (2023-2034) (\$MN)

Table 29 Global Automotive Connectivity Market Outlook, By Telematics Control Unit (TCU) (2023-2034) (\$MN)

Table 30 Global Automotive Connectivity Market Outlook, By Connectivity Control Unit (CCU) (2023-2034) (\$MN)

Table 31 Global Automotive Connectivity Market Outlook, By Antennas (2023-2034) (\$MN)

Table 32 Global Automotive Connectivity Market Outlook, By Communication Modules (2023-2034) (\$MN)

Table 33 Global Automotive Connectivity Market Outlook, By Gateways (2023-2034) (\$MN)

Table 34 Global Automotive Connectivity Market Outlook, By Embedded SIM (eSIM) (2023-2034) (\$MN)

Table 35 Global Automotive Connectivity Market Outlook, By End User (2023-2034) (\$MN)

Table 36 Global Automotive Connectivity Market Outlook, By Individual Vehicle Owners (2023-2034) (\$MN)

Table 37 Global Automotive Connectivity Market Outlook, By Fleet Operators (2023-2034) (\$MN)

Table 38 Global Automotive Connectivity Market Outlook, By Mobility-as-a-Service (MaaS) Providers (2023-2034) (\$MN)

Table 39 Global Automotive Connectivity Market Outlook, By Automotive OEMs (2023-2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World

(RoW) are also represented in the same manner as above.

I would like to order

Product name: Automotive Connectivity Market Forecasts to 2034 – Global Analysis By Connectivity Type (Embedded Connectivity, Integrated Connectivity, and Tethered Connectivity), Network Type, Technology, Communication Type, Hardware, End User and By Geography

Product link: <https://marketpublishers.com/r/AE777977E323EN.html>

Price: US\$ 4,150.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AE777977E323EN.html>