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Connected Car & Telematics Market Forecasts to 2032 – Global Analysis By Solution Type (Fleet Management, Vehicle Tracking, Navigation & Infotainment, and Remote Diagnostics), Component, Connectivity Type, Vehicle Type, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Connected Car & Telematics Market is accounted for $26.8 billion in 2025 and is expected to reach $143.6 billion by 2032 growing at a CAGR of 27.1% during the forecast period. Connected Car & Telematics refer to vehicles integrated with internet connectivity and onboard systems that gather and transmit data. These technologies enable navigation, entertainment, remote diagnostics, and driver assistance, enhancing safety and performance monitoring. Telematics supports predictive maintenance and fleet optimization. By connecting vehicles to digital ecosystems, they enable smart mobility and real-time decision-making. This convergence of automotive and digital innovation transforms transportation into a data-driven experience, aligning with evolving consumer expectations and intelligent infrastructure development.

According to Deloitte Mobility Insights, telematics systems are central to vehicle data monetization, enabling predictive maintenance, usage-based insurance, and personalized infotainment experiences.

Market Dynamics:

Driver:

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Increased vehicle connectivity and safety focus

Increased vehicle connectivity and safety focus is propelling the growth of the connected car and telematics market. Automakers are integrating advanced telematics systems to enhance real-time tracking, predictive maintenance, and driver assistance functionalities. Fueled by the demand for safer and smarter mobility, connected solutions are redefining vehicle intelligence and fleet efficiency. Moreover, regulatory mandates for emergency response systems and accident data recording are further stimulating widespread adoption of telematics-enabled connected car technologies worldwide.

Restraint:

High integration and maintenance costs

High integration and maintenance costs remain a significant restraint in the connected car ecosystem. The deployment of telematics infrastructure demands complex software-hardware synchronization and consistent connectivity management, driving up operational expenses. Additionally, frequent software updates, sensor calibration, and cybersecurity compliance add to total lifecycle costs. Smaller fleet operators and low-cost vehicle manufacturers often face challenges in implementing scalable connected solutions, limiting penetration across emerging economies despite growing awareness of vehicle data-driven operational benefits.

Opportunity:

5G-powered telematics and cloud expansion

The emergence of 5G-powered telematics and cloud expansion presents a transformative opportunity in the connected car industry. Ultra-low latency communication is enabling seamless data transfer, remote diagnostics, and vehicle-to-everything (V2X) interactions. Automakers are increasingly leveraging cloud computing to process large telematics datasets for predictive insights and performance optimization. Furthermore, partnerships between telecom providers and automotive OEMs are accelerating smart mobility ecosystems, fostering the evolution of autonomous, connected, and intelligent vehicle networks across global transportation systems.

Threat:

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Cybersecurity breaches in connected vehicles

Cybersecurity breaches in connected vehicles pose a growing threat to data integrity and passenger safety. As vehicle systems become more digitized and network-reliant, vulnerabilities in communication protocols and control units increase exposure to hacking risks. A single breach can disrupt vehicle functionality, compromise driver information, and erode brand trust. Consequently, automakers are investing in advanced encryption technologies, intrusion detection systems, and multi-layer cybersecurity frameworks to ensure end-to-end protection of connected vehicle networks.

Covid-19 Impact:

The COVID-19 pandemic initially disrupted supply chains and delayed telematics hardware production, slowing connected car deployments. However, the crisis accelerated digital transformation, as fleet operators adopted telematics for contactless monitoring, route optimization, and vehicle health analytics. Remote connectivity became a key enabler for continuity in logistics and mobility services. Post-pandemic recovery has been characterized by strong investments in intelligent fleet solutions and cloud-based telematics, reinforcing the industry's shift toward smart and resilient vehicle operations.

The fleet management segment is expected to be the largest during the forecast period

The fleet management segment is expected to account for the largest market share during the forecast period, owing to the rising adoption of telematics for optimizing route efficiency, driver performance, and fuel consumption. Logistics providers are leveraging real-time data analytics for predictive maintenance and regulatory compliance. Additionally, growing demand for end-to-end visibility in commercial transportation is propelling large-scale fleet telematics integration, positioning this segment as the backbone of connected vehicle infrastructure worldwide.

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

Over the forecast period, the hardware segment is predicted to witness the highest growth rate, reinforced by advancements in sensors, GPS modules, and onboard communication systems. Increasing integration of advanced driver assistance systems

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(ADAS) and IoT devices within vehicles is driving hardware demand. Moreover, the proliferation of connected infotainment systems and telematics control units enhances data accuracy and user experience, making hardware innovation central to the evolution of intelligent connected vehicle ecosystems globally.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, ascribed to rapid automotive digitization, supportive government regulations, and expanding 5G connectivity. China, Japan, and South Korea lead in telematics adoption, with strong collaborations between telecom operators and automotive OEMs. Additionally, the region’s growing middle-class population and rising vehicle ownership are accelerating connected car deployment, making Asia Pacific a global hub for telematics innovation and deployment.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with increasing penetration of advanced driver assistance technologies and autonomous driving platforms. The U.S. and Canada are leading in telematics integration for commercial fleets, supported by regulatory mandates for electronic logging and driver monitoring. Furthermore, strategic alliances between automakers and tech giants are propelling innovation in connected car ecosystems, reinforcing North America’s dominance in telematics-driven mobility solutions.

Key players in the market

Some of the key players in Connected Car & Telematics Market include Tesla Inc., Bosch, Continental AG, Harman International, Delphi Technologies, Garmin, TomTom, Pioneer Corporation, ZF Friedrichshafen AG, Cisco Systems, Nokia, Intel Corporation, NXP Semiconductors, Qualcomm, and Ericsson.

Key Developments:

In October 2025, Tesla Inc. began the full rollout of its latest 'Tesla Intelligence' software update (v12.5), introducing a more advanced AI-powered voice assistant capable of handling complex, multi-step commands for navigation, entertainment, and vehicle settings without a cellular connection by leveraging the car's local computing power.

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In September 2025, Qualcomm launched the new 'Snapdragon Digital Chassis 4' platform, featuring an integrated 5G modem and AI accelerator designed to enable next-generation telematics, enhanced over-the-air (OTA) update speeds, and richer in-vehicle infotainment experiences for a wider range of automakers.

In August 2025, Bosch announced a major partnership with a leading European OEM to deploy its new 'Connected Control Unit,' which consolidates multiple electronic control units (ECUs) into a single, more powerful computer. This reduces vehicle wiring, lowers weight, and provides a centralized platform for software-defined features and telematics data.

Solution Types Covered:

- Fleet Management
- Vehicle Tracking
- Navigation & Infotainment
- Remote Diagnostics

Components Covered:

- Hardware
- Software
- Services

Connectivity Types Covered:

- Embedded
- Integrated
- Tethered

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Vehicle Types Covered:

- Passenger Cars
- Commercial Vehicles
- Electric Vehicles
- Autonomous Vehicles

End Users Covered:

- Insurance Companies
- Aftermarket Providers
- OEMs

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France

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- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar

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South Africa

Rest of Middle East & 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 2024, 2025, 2026, 2028, and 2032
- 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

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Contents

1 EXECUTIVE SUMMARY

2 PREFACE

2.1 Abstract
2.2 Stake Holders
2.3 Research Scope
2.4 Research Methodology
  2.4.1 Data Mining
  2.4.2 Data Analysis
  2.4.3 Data Validation
  2.4.4 Research Approach
2.5 Research Sources
  2.5.1 Primary Research Sources
  2.5.2 Secondary Research Sources
  2.5.3 Assumptions

3 MARKET TREND ANALYSIS

3.1 Introduction
3.2 Drivers
3.3 Restraints
3.4 Opportunities
3.5 Threats
3.6 End User Analysis
3.7 Emerging Markets
3.8 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

4.1 Bargaining power of suppliers
4.2 Bargaining power of buyers
4.3 Threat of substitutes
4.4 Threat of new entrants
4.5 Competitive rivalry

5 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY SOLUTION TYPE

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5.1 Introduction
5.2 Fleet Management
5.3 Vehicle Tracking
5.4 Navigation & Infotainment
5.5 Remote Diagnostics

6 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY COMPONENT

6.1 Introduction
6.2 Hardware
6.3 Software
6.4 Services

7 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY CONNECTIVITY TYPE

7.1 Introduction
7.2 Embedded
7.3 Integrated
7.4 Tethered

8 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY VEHICLE TYPE

8.1 Introduction
8.2 Passenger Cars
8.3 Commercial Vehicles
8.4 Electric Vehicles
8.5 Autonomous Vehicles

9 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY END USER

9.1 Introduction
9.2 Insurance Companies
9.3 Aftermarket Providers
9.4 OEMs

10 GLOBAL CONNECTED CAR & TELEMATICS MARKET, BY GEOGRAPHY

10.1 Introduction

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10.2 North America
10.2.1 US
10.2.2 Canada
10.2.3 Mexico
10.3 Europe
10.3.1 Germany
10.3.2 UK
10.3.3 Italy
10.3.4 France
10.3.5 Spain
10.3.6 Rest of Europe
10.4 Asia Pacific
10.4.1 Japan
10.4.2 China
10.4.3 India
10.4.4 Australia
10.4.5 New Zealand
10.4.6 South Korea
10.4.7 Rest of Asia Pacific
10.5 South America
10.5.1 Argentina
10.5.2 Brazil
10.5.3 Chile
10.5.4 Rest of South America
10.6 Middle East & Africa
10.6.1 Saudi Arabia
10.6.2 UAE
10.6.3 Qatar
10.6.4 South Africa
10.6.5 Rest of Middle East & Africa

11 KEY DEVELOPMENTS

11.1 Agreements, Partnerships, Collaborations and Joint Ventures
11.2 Acquisitions & Mergers
11.3 New Product Launch
11.4 Expansions
11.5 Other Key Strategies

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12 COMPANY PROFILING

12.1 Tesla Inc.
12.2 Bosch
12.3 Continental AG
12.4 Harman International
12.5 Delphi Technologies
12.6 Garmin
12.7 TomTom
12.8 Pioneer Corporation
12.9 ZF Friedrichshafen AG
12.10 Cisco Systems
12.11 Nokia
12.12 Intel Corporation
12.13 NXP Semiconductors
12.14 Qualcomm
12.15 Ericsson

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List Of Tables

LIST OF TABLES

Table 1 Global Connected Car & Telematics Market Outlook, By Region (2024-2032) ($MN)
Table 2 Global Connected Car & Telematics Market Outlook, By Solution Type (2024-2032) ($MN)
Table 3 Global Connected Car & Telematics Market Outlook, By Fleet Management (2024-2032) ($MN)
Table 4 Global Connected Car & Telematics Market Outlook, By Vehicle Tracking (2024-2032) ($MN)
Table 5 Global Connected Car & Telematics Market Outlook, By Navigation & Infotainment (2024-2032) ($MN)
Table 6 Global Connected Car & Telematics Market Outlook, By Remote Diagnostics (2024-2032) ($MN)
Table 7 Global Connected Car & Telematics Market Outlook, By Component (2024-2032) ($MN)
Table 8 Global Connected Car & Telematics Market Outlook, By Hardware (2024-2032) ($MN)
Table 9 Global Connected Car & Telematics Market Outlook, By Software (2024-2032) ($MN)
Table 10 Global Connected Car & Telematics Market Outlook, By Services (2024-2032) ($MN)
Table 11 Global Connected Car & Telematics Market Outlook, By Connectivity Type (2024-2032) ($MN)
Table 12 Global Connected Car & Telematics Market Outlook, By Embedded (2024-2032) ($MN)
Table 13 Global Connected Car & Telematics Market Outlook, By Integrated (2024-2032) ($MN)
Table 14 Global Connected Car & Telematics Market Outlook, By Tethered (2024-2032) ($MN)
Table 15 Global Connected Car & Telematics Market Outlook, By Vehicle Type (2024-2032) ($MN)
Table 16 Global Connected Car & Telematics Market Outlook, By Passenger Cars (2024-2032) ($MN)
Table 17 Global Connected Car & Telematics Market Outlook, By Commercial Vehicles (2024-2032) ($MN)
Table 18 Global Connected Car & Telematics Market Outlook, By Electric Vehicles

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(2024-2032) ($MN)
Table 19 Global Connected Car & Telematics Market Outlook, By Autonomous Vehicles (2024-2032) ($MN)
Table 20 Global Connected Car & Telematics Market Outlook, By End User (2024-2032) ($MN)
Table 21 Global Connected Car & Telematics Market Outlook, By Insurance Companies (2024-2032) ($MN)
Table 22 Global Connected Car & Telematics Market Outlook, By Aftermarket Providers (2024-2032) ($MN)
Table 23 Global Connected Car & Telematics Market Outlook, By OEMs (2024-2032) ($MN)
Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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