

Over-the-Air Software Update Market Forecasts to 2032 – Global Analysis By Type (Firmware Over-the-Air (FOTA), Software Over-the-Air (SOTA), Map Over-the-Air (MOTA), and Configuration Over-the-Air (COTA)), Component, Vehicle Type, Technology, Application, End User, and By Geography.

<https://marketpublishers.com/r/ODA14545559AEN.html>

Date: April 2025

Pages: 200

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

ID: ODA14545559AEN

Abstracts

According to Statistics MRC, the Global Over-the-Air Software Update Market is accounted for \$5.7 billion in 2025 and is expected to reach \$18.5 billion by 2032 growing at a CAGR of 18.3% during the forecast period. Over-the-Air Software Update is a method of remotely delivering software changes, fixes, or enhancements to electronic devices without requiring physical access. It uses wireless communication to install updates automatically or with user approval. This process is commonly used in smartphones, vehicles, and smart appliances to improve functionality, security, and performance. Updates are transmitted via cellular networks, Wi-Fi, or satellite, allowing devices to stay current and adapt to new features or threats without manual intervention.

According to S&P Global, OTA updates are critical for EVs, allowing OEMs to remotely improve battery management systems and fix software bugs without dealership visits, enhancing vehicle performance and safety.

Market Dynamics:

Driver:

Growth in connected vehicles

The Over-the-Air (OTA) Software Update Market is being driven by the rapid proliferation of connected vehicles and the rising demand for real-time software management. Automakers are leveraging OTA updates to enhance vehicle functionality, safety, and user experience without physical intervention. Fueled by advancements in IoT and telematics, connected vehicles require continuous software optimization. Additionally, consumer expectations for seamless infotainment and diagnostics are accelerating adoption. Consequently, OTA technology has become integral to modern automotive digital ecosystems.

Restraint:

Cybersecurity challenges

Cybersecurity vulnerabilities pose a major restraint to the OTA Software Update Market, as vehicles become increasingly software-dependent. The risk of unauthorized access and data breaches raises significant safety concerns among consumers and regulators. Securing multiple data communication layers—from cloud to vehicle endpoints—demands advanced encryption and authentication frameworks. Moreover, compliance with evolving data privacy laws adds complexity to deployment. These cybersecurity constraints continue to slow large-scale OTA integration, particularly in safety-critical automotive systems.

Opportunity:

Fleet and commercial vehicle integration

The integration of OTA technology into fleet and commercial vehicle operations presents substantial growth opportunities. Fleet managers can remotely update vehicle systems, optimize performance, and reduce downtime through centralized software management. This capability enhances operational efficiency and lowers maintenance costs. Spurred by the adoption of connected logistics and telematics, OTA solutions are becoming vital for fleet modernization. The segment's scalability and real-time analytics capabilities make it a key enabler of digital fleet transformation.

Threat:

Software fragmentation

Software fragmentation remains a persistent threat to the OTA Software Update Market, as varying standards and protocols hinder seamless update deployment. The coexistence of diverse operating systems, hardware architectures, and connectivity platforms complicates interoperability. This fragmentation increases the risk of update failures and system incompatibility. Furthermore, it challenges OEMs to maintain consistent performance across vehicle models and brands. Unless unified industry standards emerge, software fragmentation could impede OTA scalability and reliability.

Covid-19 Impact:

The COVID-19 pandemic disrupted automotive production but accelerated digital transformation across the industry, boosting OTA adoption. Lockdowns highlighted the value of remote diagnostics and contactless servicing, leading OEMs to prioritize OTA capabilities. Post-pandemic recovery has seen increased investment in cloud-based platforms and vehicle connectivity solutions. Additionally, automakers leveraged OTA updates to roll out software enhancements without dealership visits. Hence, the pandemic acted as a catalyst for widespread OTA technology acceptance and implementation.

The firmware over-the-air (FOTA) segment is expected to be the largest during the forecast period

The firmware over-the-air (FOTA) segment is expected to account for the largest market share during the forecast period, resulting from its critical role in maintaining and enhancing vehicle functionality. FOTA enables real-time firmware updates to ECUs, improving performance, security, and compliance. Its application in engine control, telematics, and ADAS systems strengthens its dominance. Moreover, OEMs favor FOTA for cost efficiency and reduced service downtime. Continuous advancements in automotive IoT further reinforce this segment's leadership.

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

Over the forecast period, the cloud platform segment is predicted to witness the highest growth rate, propelled by the shift toward scalable, secure, and centralized OTA delivery frameworks. Cloud-based systems enable efficient data management, remote monitoring, and over-the-air deployment across large vehicle fleets. Rising demand for real-time analytics and predictive maintenance further boosts cloud adoption. Additionally, partnerships between automakers and cloud providers are accelerating

innovation. This segment's agility and security underpin its rapid expansion.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, attributed to robust automotive manufacturing and rapid connected vehicle adoption in China, Japan, and South Korea. Government initiatives supporting smart mobility and digital infrastructure enhance market growth. The expansion of 5G connectivity and local cloud ecosystems further accelerates OTA deployment. Additionally, rising consumer demand for advanced in-vehicle software solidifies the region's leadership in OTA adoption.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR associated with strong technological innovation, data security advancements, and high connected vehicle penetration. Major automakers and tech firms in the U.S. are heavily investing in OTA-enabled platforms. Supportive regulatory frameworks for vehicle safety and data integrity further drive adoption. Moreover, growing demand for autonomous and electric vehicles amplifies the region's reliance on OTA systems for software optimization.

Key players in the market

Some of the key players in Over-the-Air Software Update Market include Harman International, Airbiquity Inc., Garmin Ltd., Hitachi Automotive Systems, Infineon Technologies AG, NXP Semiconductors, Verizon Communications, WindRiver, Libelium, Excelfore, Movimento, TomTom NV, BlackBerry QNX, Redbend, Sierra Wireless, and TietoEVRY.

Key Developments:

In August 2025, Harman International enhanced its OTA platform to support secure updates across ECUs, TCUs, and infotainment systems. The solution reduces data transfer costs and supports full-vehicle software lifecycle management

In August 2025, Garmin released a major OTA feature update for its smartwatches and cycling computers, adding 18 new functions including advanced running metrics and triathlon training plans. The update was delivered wirelessly to supported devices

In August 2025, WindRiver expanded its cloud-native OTA DevOps platform for software-defined vehicles. The solution supports CI/CD pipelines and edge deployment for autonomous driving, infotainment, and connectivity features.

Types Covered:

Firmware Over-the-Air (FOTA)

Software Over-the-Air (SOTA)

Map Over-the-Air (MOTA)

Configuration Over-the-Air (COTA)

Components Covered:

Software

Services

Cloud Platform

Hardware Modules

Vehicle Types Covered:

Passenger Vehicles

Commercial Vehicles

Electric Vehicles

Towable & Utility Vehicles

Technologies Covered:

Cellular

Wi-Fi

Bluetooth

Satellite

Applications Covered:

Telematics

Infotainment

Electronic Control Unit (ECU)

Safety & Security

Communication System

End Users Covered:

Automotive OEMs

Fleet Operators

Telecom Providers

Software Developers

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

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

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

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 Technology Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 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 OVER-THE-AIR SOFTWARE UPDATE MARKET, BY TYPE

- 5.1 Introduction
- 5.2 Firmware Over-the-Air (FOTA)
- 5.3 Software Over-the-Air (SOTA)
- 5.4 Map Over-the-Air (MOTA)
- 5.5 Configuration Over-the-Air (COTA)

6 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY COMPONENT

- 6.1 Introduction
- 6.2 Software
- 6.3 Services
- 6.4 Cloud Platform
- 6.5 Hardware Modules

7 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY VEHICLE TYPE

- 7.1 Introduction
- 7.2 Passenger Vehicles
- 7.3 Commercial Vehicles
- 7.4 Electric Vehicles
- 7.5 Towable & Utility Vehicles

8 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY TECHNOLOGY

- 8.1 Introduction
- 8.2 Cellular
- 8.3 Wi-Fi
- 8.4 Bluetooth
- 8.5 Satellite

9 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY APPLICATION

- 9.1 Introduction
- 9.2 Telematics
- 9.3 Infotainment
- 9.4 Electronic Control Unit (ECU)

9.5 Safety & Security

9.6 Communication System

10 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY END USER

10.1 Introduction

10.2 Automotive OEMs

10.3 Fleet Operators

10.4 Telecom Providers

10.5 Software Developers

11 GLOBAL OVER-THE-AIR SOFTWARE UPDATE MARKET, BY GEOGRAPHY

11.1 Introduction

11.2 North America

11.2.1 US

11.2.2 Canada

11.2.3 Mexico

11.3 Europe

11.3.1 Germany

11.3.2 UK

11.3.3 Italy

11.3.4 France

11.3.5 Spain

11.3.6 Rest of Europe

11.4 Asia Pacific

11.4.1 Japan

11.4.2 China

11.4.3 India

11.4.4 Australia

11.4.5 New Zealand

11.4.6 South Korea

11.4.7 Rest of Asia Pacific

11.5 South America

11.5.1 Argentina

11.5.2 Brazil

11.5.3 Chile

11.5.4 Rest of South America

11.6 Middle East & Africa

- 11.6.1 Saudi Arabia
- 11.6.2 UAE
- 11.6.3 Qatar
- 11.6.4 South Africa
- 11.6.5 Rest of Middle East & Africa

12 KEY DEVELOPMENTS

- 12.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 12.2 Acquisitions & Mergers
- 12.3 New Product Launch
- 12.4 Expansions
- 12.5 Other Key Strategies

13 COMPANY PROFILING

- 13.1 Harman International
- 13.2 Airbiquity Inc.
- 13.3 Garmin Ltd.
- 13.4 Hitachi Automotive Systems
- 13.5 Infineon Technologies AG
- 13.6 NXP Semiconductors
- 13.7 Verizon Communications
- 13.8 WindRiver
- 13.9 Libelium
- 13.10 Excelfore
- 13.11 Movimento
- 13.12 TomTom NV
- 13.13 BlackBerry QNX
- 13.14 Redbend
- 13.15 Sierra Wireless
- 13.16 TietoEVRY

List Of Tables

LIST OF TABLES

Table 1 Global Over-the-Air Software Update Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Over-the-Air Software Update Market Outlook, By Type (2024-2032) (\$MN)

Table 3 Global Over-the-Air Software Update Market Outlook, By Firmware Over-the-Air (FOTA) (2024-2032) (\$MN)

Table 4 Global Over-the-Air Software Update Market Outlook, By Software Over-the-Air (SOTA) (2024-2032) (\$MN)

Table 5 Global Over-the-Air Software Update Market Outlook, By Map Over-the-Air (MOTA) (2024-2032) (\$MN)

Table 6 Global Over-the-Air Software Update Market Outlook, By Configuration Over-the-Air (COTA) (2024-2032) (\$MN)

Table 7 Global Over-the-Air Software Update Market Outlook, By Component (2024-2032) (\$MN)

Table 8 Global Over-the-Air Software Update Market Outlook, By Software (2024-2032) (\$MN)

Table 9 Global Over-the-Air Software Update Market Outlook, By Services (2024-2032) (\$MN)

Table 10 Global Over-the-Air Software Update Market Outlook, By Cloud Platform (2024-2032) (\$MN)

Table 11 Global Over-the-Air Software Update Market Outlook, By Hardware Modules (2024-2032) (\$MN)

Table 12 Global Over-the-Air Software Update Market Outlook, By Vehicle Type (2024-2032) (\$MN)

Table 13 Global Over-the-Air Software Update Market Outlook, By Passenger Vehicles (2024-2032) (\$MN)

Table 14 Global Over-the-Air Software Update Market Outlook, By Commercial Vehicles (2024-2032) (\$MN)

Table 15 Global Over-the-Air Software Update Market Outlook, By Electric Vehicles (2024-2032) (\$MN)

Table 16 Global Over-the-Air Software Update Market Outlook, By Towable & Utility Vehicles (2024-2032) (\$MN)

Table 17 Global Over-the-Air Software Update Market Outlook, By Technology (2024-2032) (\$MN)

Table 18 Global Over-the-Air Software Update Market Outlook, By Cellular (2024-2032)

(\$MN)

Table 19 Global Over-the-Air Software Update Market Outlook, By Wi-Fi (2024-2032)

(\$MN)

Table 20 Global Over-the-Air Software Update Market Outlook, By Bluetooth

(2024-2032) (\$MN)

Table 21 Global Over-the-Air Software Update Market Outlook, By Satellite (2024-2032)

(\$MN)

Table 22 Global Over-the-Air Software Update Market Outlook, By Application

(2024-2032) (\$MN)

Table 23 Global Over-the-Air Software Update Market Outlook, By Telematics

(2024-2032) (\$MN)

Table 24 Global Over-the-Air Software Update Market Outlook, By Infotainment

(2024-2032) (\$MN)

Table 25 Global Over-the-Air Software Update Market Outlook, By Electronic Control

Unit (ECU) (2024-2032) (\$MN)

Table 26 Global Over-the-Air Software Update Market Outlook, By Safety & Security

(2024-2032) (\$MN)

Table 27 Global Over-the-Air Software Update Market Outlook, By Communication

System (2024-2032) (\$MN)

Table 28 Global Over-the-Air Software Update Market Outlook, By End User

(2024-2032) (\$MN)

Table 29 Global Over-the-Air Software Update Market Outlook, By Automotive OEMs

(2024-2032) (\$MN)

Table 30 Global Over-the-Air Software Update Market Outlook, By Fleet Operators

(2024-2032) (\$MN)

Table 31 Global Over-the-Air Software Update Market Outlook, By Telecom Providers

(2024-2032) (\$MN)

Table 32 Global Over-the-Air Software Update Market Outlook, By Software Developers

(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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