

North America Connected Vehicle Market Forecast to 2030 - Regional Analysis - by Technology (5G, 4G/LTE, and 3G & 2G), Connectivity (Integrated, Tethered, and Embedded), and Application (Telematics, Infotainment, Driving Assistance, and Others)

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Abstracts

The North America connected vehicle market was valued at US\$ 11,424.96 million in 2022 and is expected to reach US\$ 40,918.19 million by 2030; it is estimated to record a CAGR of 17.3% from 2022 to 2030.

Growing demand for driving assistance system Fuels North America Connected Vehicle Market

The advancement of Advanced Driver Assistance Systems (ADAS) has positively impacted the connected vehicle market, reshaping the automotive landscape in several significant ways. ADAS is a powerful catalyst for the increased adoption of connected vehicle technology. These systems, comprising features such as adaptive cruise control, blind-spot monitoring, and automated parking assistance, have garnered immense attention for their potential to enhance road safety. As a result, consumers are valuing and actively seeking vehicles equipped with ADAS. This surge in demand is driving automakers to integrate more sophisticated connectivity features into their cars. For instance, as per the study done by the American Automobile Association, ~40% of US consumers expect at least one driver support system. As a result of such demand, the country has more than 60 million vehicles equipped with the ADAS system.

Automakers are also investing significantly in building robust, high-speed communication networks within vehicles, a critical component for the seamless operation of ADAS. This investment in connectivity infrastructure is simultaneously

driving advancements in the broader connected vehicle market. For instance, in 2018, BMW invested capital in Blackmore Sensors and Analytics, Inc., which manufactures frequency-modulated continuous wave (FMCW) lidar for the automotive industry. Blackmore used the investment to scale the production of its FMCW lidar sensor for advanced driver assistance systems (ADAS) and self-driving markets. In addition, in 2021, Volkswagen Group partnered with Microsoft to fast-track the development of automated driving.

North America Connected Vehicle Market Overview

The North America connected vehicle market is segmented into the US, Canada, and Mexico. The connected vehicle industry has garnered high revenue in North America due to a convergence of market-specific factors that create a favorable environment for growth and investment. Firstly, North America boasts a mature and technologically advanced automotive sector. Leading automotive manufacturers, technology companies, and service providers have recognized the immense potential of the market in North America and have accordingly invested in R&D and deployment of connected vehicle technologies. In addition, the regulatory landscape in North America has been instrumental in driving revenue growth. Regulatory bodies have taken a proactive stance toward encouraging the incorporation of connectivity features in vehicles, recognizing the potential for improved safety and efficiency. These regulatory initiatives have incentivized automakers to integrate connected technologies into their vehicle offerings.

The consumer base in North America is marked by a strong preference for technology and innovation. Consumers in the region have shown a high demand for vehicles equipped with advanced connectivity features, such as in-car Wi-Fi, seamless smartphone integration, and sophisticated infotainment systems. This consumer-driven demand has translated into higher sales and revenue figures for connected vehicles in the market.

North America Connected Vehicle Market Revenue and Forecast to 2030 (US\$ Thousand)

North America Connected Vehicle Market Segmentation

The North America connected vehicle market is segmented based on technology, connectivity, application, and country. Based on technology, the North America connected vehicle market is categorized into 5G, 4G/LTE, and 3G & 2G. The 4G/LTE

segment held the largest market share in 2022.

By on connectivity, the North America connected vehicle market is segmented into integrated, tethered, and embedded. The embedded segment held the largest market share in 2022.

In terms of application, the North America connected vehicle market is categorized into telematics, infotainment, driving assistance, and others. The infotainment segment held the largest market share in 2022.

Based on country, the North America connected vehicle market is segmented into the US, Canada, and Mexico. The US dominated the North America connected vehicle market share in 2022.

AT&T, Audi AG, Bayerische Motoren Werke AG, Continental AG, Denso, General Motors Co, Harman International Industries Inc, Robert Bosch GmbH, Visteon Corp, and Vodafone Group Plc are among the leading companies operating in the North America connected vehicles market.

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