

Automotive Infotainment Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

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Report description:

The Automotive Infotainment Systems Market size is estimated at USD 26.89 billion in 2024, and is expected to reach USD 36.16 billion by 2029, growing at a CAGR of 6.10% during the forecast period (2024-2029).

The impact of the COVID-19 pandemic on the automotive infotainment systems market was inevitable as the market is primarily driven by increasing vehicle sales and production. As there were continuous lockdowns and shutting down of manufacturing units, production and sales of vehicles experienced a slump in 2020. However, in the first half of 2020, global vehicle production and sales started to pick up the pace and continued their growth momentum in 2021. Global vehicle sales witnessed considerable growth in 2021 when compared to 2020. However, the market did not rebound to the levels of the year 2019, primarily due to the global semiconductor shortage. Post-pandemic, players are collaborating and developing new and innovative products to overcome the impact of the pandemic. For instance,

Key Highlights

-In September 2022, Renesas Electronics Corporation (Renesas) announced an expansion of its collaboration with VinFast, a Vietnamese emerging vehicle manufacturer, for the technological development of electric vehicles. Both companies have worked together on infotainment systems, and Renesas provides R-Car, its onboard SoC, and analog products for the VinFast electric SUVs VF8 and VF9.

Automakers are strongly competing to deploy advanced infotainment systems for their upcoming vehicle models during the forecast period. For instance, Mitsubishi Motors Corporation, Nissan Motor Co. Ltd, and Groupe Renault have adopted Google Inc.'s Android OS (operating system) for their next-generation infotainment systems. In addition, demand for IVI (In-Vehicle

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Infotainment) is expected to witness a steep rise with changing consumer behavior and demand for seamless connectivity of phones with the system.

An increase in luxury vehicle sales and customer preference for in-dash infotainment systems are some of the biggest drivers of the market. However, the rise in the number of accidents due to driver distraction may also hinder the market's growth. The world's leading automobile manufacturers are extensively working with technological OEMs, which work in domains such as audio units, display units, navigation systems, and comprehensive systems. For instance,

Key Highlights

-In October 2022, Toyota and Google Cloud expanded their partnership to include Toyota and Lexus's next-generation audio multimedia systems as well as Google Cloud's AI-based speech services. Customers can see the first fruits of the collaboration in the latest generation Toyota Audio Multimedia and Lexus Interface infotainment systems, which will be available in 2023 models such as the Toyota Corolla, Tundra, and Sequoia, as well as the Lexus NX, RX, and all-electric RZ.

Furthermore, implementing navigation and vehicle control units in commercial vehicles helps reduce the response time during emergencies, thereby eliminating the risk of accidents. Besides this, several automobile manufacturers are also offering low-cost infotainment systems, thereby increasing product affordability. Additionally, the rising adoption of smartphones, along with high internet connectivity, has a significant impact on the market growth on a global level.

The Asia-Pacific market is expected to grow rapidly during the forecast period, followed by North America and Europe. The Asia-Pacific market's expansion can be attributed to the high adoption rate of automotive infotainment systems in countries such as China, Japan, and India, which manufacture the most vehicles globally. This, in turn, is driving technological innovations across the supply chain of the automotive infotainment system. For instance,

Key Highlights

-In August 2022, Rohm Co., Ltd (Rohm) announced the development of the BD9S402MUF-C DC/DC converter IC for infotainment systems and advanced driver assistance system onboard cameras.

Automotive Infotainment Systems Market Trends

Growing Advancements in Infotainment Systems

Smartphone functions are increasingly being integrated into in-vehicle infotainment systems. Over 90% of adults in North America and Europe have access to the internet via their mobile phones, which is one of the highest rates among other regions. As the use of mobile phones has increased, so has the use of smartphones in cars for the same purposes.

Automobile manufacturers are also opting for modular hardware design. This allows them to lower the cost of purchasing infotainment systems. They are developing technologies that allow smartphone functions to be integrated into in-vehicle infotainment systems at a low cost. Manufacturers are working to combine processing power and system competitiveness. For car manufacturers to improve the performance of connected vehicles, digital services generate massive amounts of data.

- In August 2021, Hyundai Motors selected QT, a global software technology company, as its human-machine interface (HMI) technology partner for Hyundai, Kia, and Genesis. This technology would allow Hyundai Motors to develop a connected car operating system across its vehicle infotainment systems.

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- In September 2021, LG Electronic unveiled their in-vehicle infotainment system in IAA Mobility held in Munich, Germany. The in-vehicle infotainment system was based on Google Android automotive and Android 10 to optimize connectivity and convenience. The in-vehicle infotainment system's software was developed with Renault's partnership, and it is equipped with the Renault Megane E-TECH electric, launched in February 2022.

The automotive infotainment system is undergoing massive technological transformations. With growing smartphone usage, there is an increase in the adoption of ADAS and Autonomous driving technology (self-driving cars). Technologies like Automotive systems vehicles, especially for passenger seating, have become excessively familiar. As engineers develop innovative versions of in-vehicle infotainment systems, these features will become essential contributors to the vehicle's electronic system.

The introduction of AI and cloud services is expected to drive technological advancements in automotive infotainment systems. Most companies rely on the existing Google and Apple ecosystems for their infotainment systems. Although some players prefer to develop their infotainment system OS in-house,

China is Driving the Asia-Pacific Market

China occupied a significant share of the Asia-Pacific automotive industry among Asia-Pacific countries due to its highest vehicle sales over the past decade. The country is anticipated to continue to see positive vehicle sales during the forecast period, owing to the growing focus on new energy vehicles (NEV) among automakers.

The shift from simple audio systems to touchscreen infotainment systems that support multiple features, such as navigation, Apple CarPlay, Android Auto, and telematics, is driving the demand for infotainment systems in the country.

China is one of the world's largest automotive markets, with over 20.17 million passenger cars sold in the country in 2020, and overall car sales in China reached around 21.48 million vehicles in 2021. However, Chinese automakers are pioneering the development of the intelligent cockpit, which is quickly becoming an essential component of the modern driving experience. Intelligent cockpits combine smart technologies with various driving functions, such as voice recognition for vehicle commands and entertainment and navigation systems. For instance,

- In September 2022, NVIDIA Corporation (NVIDIA) announced the development of Drive Soar, a centralized in-vehicle computer capable of integrating autonomous driving/advanced driver assistance systems (ADAS) and in-vehicle infotainment systems.

Further, In July 2021, World artificial intelligence conference, China's automobile market was leading in the development of smart cockpits with more than 82,300 patents application related to intelligent cockpits, followed by Japan and the United States at 31,900 and 19,300, respectively. Intelligent cockpits are becoming a critical technology in the modern driving experience; voice recognition and multiple drive functions navigation systems are some of the prime technologies integrated into intelligent vehicle cockpits.

Automotive Infotainment Systems Industry Overview

Major players such as Robert Bosch, Alpine Electronics, Panasonic Corporation, HARMAN International, and Mitsubishi Electric Corporation dominate the automotive infotainment systems market. These companies have strong distribution networks at a global level and offer an extensive product range. These companies adopt strategies such as new product developments, collaborations, and contracts and agreements to sustain their market positions.

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- In September 2022, Mercedes-Benz AG and Qualcomm Technologies, Inc. announced a collaboration to use Snapdragon Digital Chassis solutions to bring the most advanced digital capabilities to future Mercedes-Benz vehicles. Mercedes-Benz is using Qualcomm Cockpit Platforms to power intuitive and intelligent infotainment systems. These next-generation systems will include highly intuitive AI experiences for in-car virtual assistance.
- In June 2022, Mercedes-Benz Group AG announced a collaboration with ZYNC, a California-based technology company. Under this partnership, the latter company will provide a premium in-car digital entertainment platform for the OEM.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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