

Software Defined Vehicle Market by SDV Type (Semi-SDV, SDV), E/E Architecture (Distributed, Domain Centralised, Zonal Control), Vehicle Type (Passenger Car and Light Commercial Vehicle) and Region - Global Forecast to 2030

Market Report | 2024-07-17 | 239 pages | MarketsandMarkets

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Report description:

The Software Defined Vehicle Market size is projected to grow from USD 213.5 billion in 2024 to USD 1,237.6 billion by 2030, at a CAGR of 34.0%. SDVs are becoming increasingly popular due to various factors such as Consumers benefit from a highly personalized driving experience, with settings and preferences customized as per drivers. For OEMs, SDVs open up new revenue streams by allowing them to sell software-based features and services. Moreover, the rise of pay-per-use mobility models offers flexible usage options like car-sharing and subscriptions, catering to modern consumer preferences.

"Zonal Controller Architecture is likely to be the leading segment in the Software Defined Vehicle market by E/E Architecture during the forecast period."

SDVs come with an array of electronic features developed for improved driving comfort, vehicle safety, and fault detection. SDV providers such as Tesla (US), NIO (China), XPENG (China), ZEEKR (China), and Li Auto Inc. (China) have adopted a software-first approach in which they start with zonal control units to utilize the advanced and integrated software features of SDVs. Legacy OEMs also plan to shift to zonal compute systems with their SDV shift. Volkswagen plans to integrate XPENG's CES architecture in its vehicles, starting from 2026, which will be equipped with zonal control central computing. Other OEMs such as Hyundai, Mercedes, and BMW also plan to shift to zonal control architecture by 2026-2028, incorporated in their latest vehicle platforms. Zonal controllers allow OEMs to control the whole vehicle through 4-10 HPCs per vehicle and reduce the need for excessive wiring in the vehicles. Thus, the transition to zonal control is seen as a significant step towards fully realizing the potential of SDVs, offering a more streamlined, adaptable, and efficient vehicle architecture.

"Europe shows high growth potential for Software Defined Vehicle market."

Europe presents a huge growth opportunity for the Software Defined Vehicle market, which is characterized by stringent safety

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requirements and a need for better user experience. It is home to leading OEMs such as Volkswagen, BMW, Renault, Stellantis, and Mercedes-Benz, which are transitioning toward SDVs. In Europe, OEMs are expanding in the region through strategic partnerships and acquisitions. For instance, in February 2023, CARIAD GmbH acquired Hexad GmbH's Mobility Services Platform unit which enhanced its cloud service capabilities for Volkswagen Group's digital automotive ecosystem. This acquisition integrated over 75 Hexad developers into CARIAD which strengthened its software development for improved digital services across Group brands. Also, in March 2024, Volkswagen Group plans to utilize its 23 regional plants to support the development and production of SDVs in Europe.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in the SDV market. The break-up of the primaries is as follows:

- By Company Type: Tier I - 42%, Tier II - 40%, and OEM -18%,
- By Designation: C-level Executives- 57%, Directors - 29%, and Executives - 14%
- By Region: North America - 39%, Europe - 33%, and Asia Pacific - 28%

The Software Defined Vehicle market comprises major manufacturers such as Tesla (US), Li Auto Inc. (China), NIO (China), Rivian (US), XPENG Inc. (China), and ZEEKR (China), etc.

Research Coverage:

The study covers the Software Defined Vehicle market across various segments. It aims to estimate the market size and future growth potential of this market across different segments such as SDV type, vehicle type, E/E architecture, and region. The study also includes an in-depth competitive analysis of key market players, their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

This research report categorizes Software Defined Vehicle Market by SDV type (Semi-SDV, SDV), vehicle type (Passenger Car, Light Commercial Vehicle), E/E architecture, (Distributed Architecture, Domain Centralised Architecture, Zonal Control Architecture) and region Region (Asia Pacific, Europe, and North America).

The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the Software Defined Vehicle market. A detailed analysis of the key industry players provides insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, new product & service launches, mergers and acquisitions, and recent developments associated with the Software Defined Vehicle market. This report covers a competitive analysis of SMEs/startups in the Software Defined Vehicle market ecosystem.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall Software Defined Vehicle market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- Analysis of key drivers (Reduced recall and manufacturing costs, personalized client engagement, integration of ADAS digital cockpits, and increasing adoption of 5G technology), restraints (Limited over-the-air updates and increase in risk of cyberattacks), opportunities (Remote diagnostics, Pay-per-use mobility, SDV platform monetization and Digital twin for emergency repair), and challenges (Complex software updates and security patching and risk of data breach) influencing the growth of the Software Defined Vehicle market.
- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the Software Defined Vehicle market.
- Market Development: Comprehensive information about lucrative markets - the report analyses the Software Defined Vehicle

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market across varied regions.

-□Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the Software Defined Vehicle market.

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Tesla (US), Li Auto Inc. (China), NIO (China), Rivian (US), XPENG Inc. (China), and ZEEKR (China), among others in the Software Defined Vehicle market.

Table of Contents:

1	INTRODUCTION	18
1.1	STUDY OBJECTIVES	18
1.2	MARKET DEFINITION	19
1.2.1	INCLUSIONS AND EXCLUSIONS	20
1.3	MARKET SCOPE	21
1.3.1	MARKETS COVERED	21
1.3.2	REGIONS COVERED	21
1.3.3	YEARS CONSIDERED	21
1.4	CURRENCY CONSIDERED	22
1.5	UNIT CONSIDERED	22
1.6	STAKEHOLDERS	22
2	RESEARCH METHODOLOGY	24
2.1	RESEARCH DATA	24
2.1.1	SECONDARY DATA	25
2.1.1.1	Key secondary sources	26
2.1.1.1.1	List of key secondary sources	26
2.1.1.2	Key data from secondary sources	27
2.1.2	PRIMARY DATA	27
2.1.2.1	Primary interview participants (OEMs, hardware providers, tech integrators)	28
2.1.2.2	Key industry insights	28
2.1.2.3	Breakdown of primary interviews	29
2.1.2.4	List of primary interview participants	29
2.2	MARKET SIZE ESTIMATION METHODOLOGY	30
2.2.1	BOTTOM-UP APPROACH	31
2.3	MARKET BREAKDOWN AND DATA TRIANGULATION	32
2.4	FACTOR ANALYSIS	33
2.5	RESEARCH ASSUMPTIONS	34
2.6	RESEARCH LIMITATIONS	34
2.7	RISK ANALYSIS	35
3	EXECUTIVE SUMMARY	36
4	PREMIUM INSIGHTS	39
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN SDV ECOSYSTEM	39
4.2	FUTURE OF SDV MARKET, BY REGION	40
4.3	FUTURE OF SDV MARKET, BY SDV TYPE	40
4.4	FUTURE OF SDV MARKET, BY VEHICLE TYPE	41
5	MARKET OVERVIEW	42

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- 5.1 INTRODUCTION 42
- 5.2 MARKET DYNAMICS 43
 - 5.2.1 DRIVERS 43
 - 5.2.1.1 Reduced recall and manufacturing costs 43
 - 5.2.1.2 Personalized client engagement 44
 - 5.2.1.3 Integration of ADAS digital cockpits 46
 - 5.2.1.4 Increasing adoption of 5G technology 47
 - 5.2.2 RESTRAINTS 48
 - 5.2.2.1 Limited over-the-air updates 48
 - 5.2.2.2 Increase in risk of cyberattacks in SDVs 49
 - 5.2.3 OPPORTUNITIES 50
 - 5.2.3.1 Remote diagnostics 50
 - 5.2.3.2 Pay-per-use mobility 51
 - 5.2.3.3 SDV platform monetization 52
 - 5.2.3.4 Digital twin for emergency repair 53
 - 5.2.4 CHALLENGES 54
 - 5.2.4.1 Complex software updates and security patching 54
 - 5.2.4.2 Risk of data breach 55
- 5.3 ECOSYSTEM ANALYSIS 57
 - 5.3.1 OEMS 57
 - 5.3.2 TIER 1 HARDWARE PROVIDERS 57
 - 5.3.3 TIER 2 PLAYERS 57
 - 5.3.4 CHIP PROVIDERS 57
 - 5.3.5 SOFTWARE PROVIDERS 58
 - 5.3.6 CLOUD PROVIDERS 58
- 5.4 TECHNOLOGY ANALYSIS (KEY ENABLERS OF SDV) 59
 - 5.4.1 INTRODUCTION 59
 - 5.4.2 CENTRAL HPC 60
 - 5.4.3 ZONAL CONTROLLERS 61
 - 5.4.4 OVER-THE-AIR UPDATES 62
 - 5.4.5 SCALABLE E/E ARCHITECTURE 63
- 5.5 OEM SDV SHIFT COMPARISON 65
- 5.6 STRATEGIES FOLLOWED BY LEGACY OEMS FOR SDV SHIFT 66
 - 5.6.1 OEM DASHBOARD FOR SDV OFFERINGS BY KEY OEMS 67
- 5.7 COMPARISON OF TECH PLAYERS AND CLOUD PROVIDERS IN SDV ECOSYSTEM 68
- 5.8 E/E ARCHITECTURE PLANS OF OEMS SHIFTING TO SDV 69
- 5.9 CASE STUDY ANALYSIS 72
 - 5.9.1 CUBIC TELECOM'S ROLE IN TRANSFORMING VEHICLE ARCHITECTURE 72
 - 5.9.2 IMPLEMENTING VIRTUAL TESTING ENVIRONMENT WITH RED HAT 72
 - 5.9.3 VOLKSWAGEN'S STRATEGIC FOCUS ON SOFTWARE INNOVATION 73
 - 5.9.4 STANDARDIZING OVER-THE-AIR UPDATES WITH ESYNC ALLIANCE 73
 - 5.9.5 CONTINENTAL AUTOMOTIVE EDGE PLATFORM IN COLLABORATION WITH AWS 74
 - 5.9.6 REVOLUTIONIZING AUTOMOTIVE SOFTWARE DEVELOPMENT WITH BLACKBERRY IVY AND AWS 75
 - 5.9.7 AWS AND BLACKBERRY'S APPROACH TO MODERNIZING VEHICLE SOFTWARE 76
 - 5.9.8 NVIDIA'S DRIVE PLATFORM POWERS VOLVO'S AUTONOMOUS VISION 76
 - 5.9.9 TESLA'S JOURNEY INTO SOFTWARE-DEFINED VEHICLES 77
 - 5.9.10 BMW'S STRATEGIC SHIFT IN AUTOMOTIVE SOFTWARE 78

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- 6 FUTURE OF SDV MARKET, BY E/E ARCHITECTURE 79
 - 6.1 INTRODUCTION 79
 - 6.2 DISTRIBUTED ARCHITECTURE 79
 - 6.3 DOMAIN CENTRALIZED ARCHITECTURE 80
 - 6.4 ZONAL CONTROL ARCHITECTURE 80
- 7 FUTURE OF SDV MARKET, BY SDV TYPE 81
 - 7.1 INTRODUCTION 82
 - 7.2 SDV 83
 - 7.2.1 INCREASED FLEXIBILITY AND AGILITY THROUGH OVER-THE-AIR UPDATES TO DRIVE SDV SHIFT 83
 - 7.3 SEMI-SDV 84
 - 7.3.1 TRANSITIONAL PHASE TOWARD MORE ADVANCED ZONAL CONTROL ARCHITECTURE 84
 - 7.4 KEY PRIMARY INSIGHTS 84
- 8 FUTURE OF SDV MARKET, BY VEHICLE TYPE 85
 - 8.1 INTRODUCTION 86
 - 8.2 PASSENGER CAR 87
 - 8.2.1 CONSUMER EXPECTATIONS FOR SEAMLESS, TECH-DRIVEN EXPERIENCES TO DRIVE MARKET 87
 - 8.3 LIGHT COMMERCIAL VEHICLE 88
 - 8.3.1 RAPID ADOPTION OF SOFTWARE-DEFINED LIGHT COMMERCIAL VEHICLES FOR GOODS TRANSPORT IN NORTH AMERICA TO DRIVE MARKET 88
 - 8.4 KEY PRIMARY INSIGHTS 89
- 9 FUTURE OF SDV MARKET, BY REGION 90
 - 9.1 INTRODUCTION 91
 - 9.2 ASIA PACIFIC 93
 - 9.2.1 GENERATIVE AI IMPACT ANALYSIS 95
 - 9.2.2 CHINA 95
 - 9.2.2.1 Platformization and SDV ecosystem development to drive market 95
 - 9.2.3 JAPAN 96
 - 9.2.3.1 Government and OEM partnerships to drive market 96
 - 9.2.4 SOUTH KOREA 97
 - 9.2.4.1 Global expansion of South Korean OEMs to drive market 97
 - 9.3 EUROPE 98
 - 9.3.1 GENERATIVE AI IMPACT ANALYSIS 99
 - 9.3.2 GERMANY 99
 - 9.3.2.1 Strong engineering landscape and leading component providers and OEMs shifting to SDV offerings to drive market 99
 - 9.3.3 FRANCE 100
 - 9.3.3.1 OEM initiatives and partnerships with software providers to drive market 100
 - 9.3.4 UK 100
 - 9.3.4.1 Government regulations to drive SDV adoption 100
 - 9.3.5 SPAIN 101
 - 9.3.5.1 OEMs planning to develop software architecture for SDVs to drive market 101
 - 9.4 NORTH AMERICA 102
 - 9.4.1 GENERATIVE AI IMPACT ANALYSIS 103
 - 9.4.2 US 104
 - 9.4.2.1 Technological advancements and OTA updates by OEMs to drive market 104
 - 9.4.3 CANADA 104
 - 9.4.3.1 Strategic partnerships and infrastructure development to drive market 104

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10	COMPETITIVE LANDSCAPE	105
10.1	INTRODUCTION	105
10.2	KEY PLAYER STRATEGIES	105
10.3	MARKET SHARE ANALYSIS, 2023	107
10.4	REVENUE ANALYSIS, 2019-2023	109
10.5	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023	110
10.5.1	STARS	110
10.5.2	EMERGING LEADERS	110
10.5.3	PERVASIVE PLAYERS	110
10.5.4	PARTICIPANTS	110
10.5.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	112
10.5.5.1	Company footprint	112
10.5.5.2	Vehicle type footprint	113
10.5.5.3	Region footprint	114
10.6	COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023	114
10.6.1	PROGRESSIVE COMPANIES	114
10.6.2	RESPONSIVE COMPANIES	114
10.6.3	DYNAMIC COMPANIES	115
10.6.4	STARTING BLOCKS	115
10.6.5	COMPETITIVE BENCHMARKING: START-UPS/SMES, 2023	116
10.7	COMPANY VALUATION AND FINANCIAL METRICS	117
10.8	COMPETITIVE SCENARIOS AND TRENDS	118
10.8.1	PRODUCT LAUNCHES	118
10.8.2	DEALS	120
11	COMPANY PROFILES	122
11.1	KEY SDV PROVIDERS	122
11.1.1	TESLA	122
11.1.1.1	Business overview	122
11.1.1.2	Products offered	124
11.1.1.3	Recent developments	126
11.1.1.3.1	Product launches	126
11.1.1.3.2	Deals	127
11.1.1.4	MnM view	128
11.1.1.4.1	Key strengths	128
11.1.1.4.2	Strategic choices	128
11.1.1.4.3	Weaknesses and competitive threats	128
11.1.2	LI AUTO INC.	129
11.1.2.1	Business overview	129
11.1.2.2	Products offered	130
11.1.2.3	Recent developments	131
11.1.2.3.1	Product launches	131
11.1.2.3.2	Deals	132
11.1.2.4	MnM view	133
11.1.2.4.1	Key strengths	133
11.1.2.4.2	Strategic choices	133
11.1.2.4.3	Weaknesses and competitive threats	134
11.1.3	ZEEKR	135

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11.1.3.1	Business overview	135
11.1.3.2	Products offered	136
11.1.3.3	Recent developments	137
11.1.3.3.1	Product launches	137
11.1.3.3.2	Deals	138
11.1.3.3.3	Expansions	139
11.1.3.3.4	Others	139
11.1.3.4	MnM view	140
11.1.3.4.1	Key strengths	140
11.1.3.4.2	Strategic choices	140
11.1.3.4.3	Weaknesses and competitive threats	140
?		
11.1.4	XPENG INC.	141
11.1.4.1	Business overview	141
11.1.4.2	Products offered	142
11.1.4.3	Recent developments	144
11.1.4.3.1	Product launches	144
11.1.4.3.2	Deals	145
11.1.4.4	MnM view	145
11.1.4.4.1	Key strengths	145
11.1.4.4.2	Strategic choices	145
11.1.4.4.3	Weaknesses and competitive threats	145
11.1.5	NIO	146
11.1.5.1	Business overview	146
11.1.5.2	Products offered	147
11.1.5.3	Recent developments	148
11.1.5.3.1	Product launches	148
11.1.5.3.2	Deals	148
11.1.5.4	MnM view	149
11.1.5.4.1	Key strengths	149
11.1.5.4.2	Strategic choices	149
11.1.5.4.3	Weaknesses and competitive threats	149
11.1.6	RIVIAN	150
11.1.6.1	Business overview	150
11.1.6.2	Products offered	152
11.1.6.3	Recent developments	153
11.1.6.3.1	Product launches	153
11.1.6.3.2	Deals	153
11.1.6.4	MnM view	154
11.1.6.4.1	Key strengths	154
11.1.6.4.2	Strategic choices	154
11.1.6.4.3	Weaknesses and competitive threats	154
11.2	KEY OEMS SHIFTING TO SDV	155
11.2.1	VOLKSWAGEN AG	155
11.2.1.1	Business overview	155
11.2.1.2	Products offered	157
11.2.1.3	Recent developments	159

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11.2.1.3.1	Product launches	159
11.2.1.3.2	Deals	159
11.2.1.3.3	Expansions	161
11.2.2	HYUNDAI MOTOR CORPORATION	162
11.2.2.1	Business overview	162
11.2.2.2	Products offered	164
11.2.2.3	Recent developments	166
11.2.2.3.1	Deals	166
11.2.3	FORD MOTOR COMPANY	167
11.2.3.1	Business overview	167
11.2.3.2	Products offered	169
11.2.3.3	Recent developments	170
11.2.3.3.1	Product launches	170
11.2.3.3.2	Deals	170
11.2.4	GENERAL MOTORS	172
11.2.4.1	Business overview	172
11.2.4.2	Products offered	174
11.2.4.3	Recent developments	175
11.2.4.3.1	Product launches	175
11.2.4.3.2	Deals	176
11.2.5	RENAULT GROUP	178
11.2.5.1	Business overview	178
11.2.5.2	Products offered	180
11.2.5.3	Recent developments	182
11.2.5.3.1	Product launches	182
11.2.5.3.2	Deals	182
11.2.6	TOYOTA MOTOR CORPORATION	184
11.2.6.1	Business overview	184
11.2.6.2	Products offered	186
11.2.6.3	Recent developments	188
11.2.6.3.1	Deals	188
11.2.7	STELLANTIS	190
11.2.7.1	Business overview	190
11.2.7.2	Products offered	193
11.2.7.3	Recent developments	194
11.2.7.3.1	Product launches	194
11.2.7.3.2	Deals	195
11.2.8	MERCEDES-BENZ AG	196
11.2.8.1	Business overview	196
11.2.8.2	Products offered	198
11.2.8.3	Recent developments	200
11.2.8.3.1	Product launches	200
11.2.8.3.2	Deals	201
11.2.9	BYD	202
11.2.9.1	Business overview	202
11.2.9.2	Products offered	204
11.2.9.3	Recent developments	206

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11.2.9.3.1	Product launches	206
11.2.9.3.2	Deals	207
11.2.10	BMW	208
11.2.10.1	Business overview	208
11.2.10.2	Products offered	210
11.2.10.3	Recent developments	212
11.2.10.3.1	Product launches	212
11.2.10.3.2	Deals	213
11.3	KEY TECH INTEGRATORS	214
11.3.1	NVIDIA CORPORATION	214
11.3.2	QUALCOMM TECHNOLOGIES INC.	215
11.3.3	BLACKBERRY LIMITED	217
11.3.4	VECTOR INFORMATIK GMBH	218
11.3.5	GOOGLE INC.	220
11.3.6	AMAZON INC.	221
11.3.7	MICROSOFT	223
11.3.8	APEX.AI	224
11.3.9	MOBILEYE	225
11.3.10	TENCENT	226
11.3.11	ALIBABA	227
11.3.12	HORIZON ROBOTICS	228
11.3.13	TATA TECHNOLOGIES	229
11.3.14	KPIT TECHNOLOGIES	230
12	RECOMMENDATIONS BY MARKETSDANDMARKETS	231
12.1	LEGACY OEMS BACKWARD-INTEGRATING TO DEVELOP THEIR SOFTWARE SYSTEMS	231
12.2	TRANSITION TO SDV TO BE SLOWER IN ICE VEHICLES AND MARKET TO BE LED BY LUXURY VEHICLES	231
12.3	LEGACY OEMS SHIFTING TO DOMAIN CENTRALIZED ARCHITECTURE AND ZONAL CONTROL	231
12.4	CONCLUSION	232
13	APPENDIX	233
13.1	KEY INSIGHTS OF INDUSTRY EXPERTS	233
13.2	DISCUSSION GUIDE	233
13.3	KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL	235
13.4	CUSTOMIZATION OPTIONS	237
13.4.1	FURTHER BREAKDOWN OF FUTURE OF SDV MARKET, BY VEHICLE TYPE AT COUNTRY-LEVEL (FOR COUNTRIES PRESENT IN THE REPORT)	237
13.4.2	ADDITIONAL COUNTRIES (APART FROM THOSE ALREADY CONSIDERED IN REPORT) WITH SIGNIFICANT SDV MARKET	237
13.4.3	COMPANY INFORMATION	237
13.4.4	PROFILES OF ADDITIONAL MARKET PLAYERS (UP TO FIVE)	237
13.5	RELATED REPORTS	237
13.6	AUTHOR DETAILS	238

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