

## **Automotive Electronics - A Global Market Overview**

Market Report | 2025-02-11 | 370 pages | Industry Experts

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### **Report description:**

#### Global Automotive Electronics Market Trends and Outlook

Over the past four decades, the greatest shift in automotive technology has been the integration of electrical and electronic systems into nearly every aspect of a vehicle's functionality. While early electrification, such as electric ignition, lighting, and starting, dates back much further, the exponential increase in electronic control and operating systems is a more recent phenomenon. Automotive Electronics encompasses electronic components and software systems designed to enhance comfort, safety, and entertainment. These systems have grown significantly in complexity, with key components like Electronic Control Units (ECUs), Current Carrying Devices, and Sensors playing a crucial role in Advanced Driver Assistance Systems (ADAS), Body Electronics, Infotainment, Powertrain, and Safety & Security Systems. For optimal performance, these subsystems must be interconnected through structured communication methods, such as wiring harnesses, bus systems (CAN, LIN, FlexRay), gateway modules, Ethernet for high-bandwidth applications, and wireless technologies like Bluetooth.

Technological advancements in artificial intelligence (AI), connectivity, and miniaturization have transformed the Automotive Electronics market, making modern vehicles more efficient, intelligent, and autonomous. AI-powered algorithms process vast amounts of sensor and camera data, enabling real-time decision-making for driver assistance and autonomous driving functions. Connectivity innovations, including 5G and vehicle-to-everything (V2X) communication, facilitate real-time interaction between vehicles, infrastructure, and pedestrians, enhancing road safety and efficiency. Cloud-based features further enable remote diagnostics, software updates, and personalized driver settings, making vehicles more adaptive and "smart." These developments ensure that today's automobiles are equipped with cutting-edge electronic systems that enhance both driver experience and safety.

The global market for Automotive Electronics is estimated at US\$300.1 billion in 2024 and is projected to reach US\$494.9 billion by 2030, growing at a CAGR of 8.7%. Key factors driving this growth include increasing consumer demand for safety and convenience, rising production and sales of electric and autonomous vehicles, and stringent regulations aimed at reducing emissions and enhancing safety. Modern vehicles are increasingly equipped with ADAS, infotainment systems, and connectivity features, making advanced safety and convenience a priority. Technologies such as automatic emergency braking, lane-keeping assist, and adaptive headlights are becoming standard, while infotainment systems integrate smartphones, GPS navigation, and media streaming. Though these features are well established in North America and Europe, demand is rapidly rising in Asia-Pacific

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and South America.

The surge in electric and autonomous vehicle sales has significantly contributed to the growing demand for advanced electronic systems. Electric vehicles rely on specialized electronics for battery management, energy storage, and motor control, optimizing efficiency and range. Autonomous vehicles, on the other hand, depend on sophisticated sensors, cameras, and AI-driven algorithms to navigate, detect obstacles, and make real-time decisions for safe, driverless operation. As these technologies continue to evolve, Automotive Electronics will play a crucial role in shaping the future of mobility.

#### Automotive Electronics Regional Market Analysis

Asia-Pacific leads the global demand for Automotive Electronics and is also expected to register the fastest CAGR in excess of 10% during the 2024-2030 analysis period. China, Japan, South Korea and India are home to some of the largest global automakers and the robust growth of the automotive industry in these countries is being fueled by rising disposable incomes, urbanization and infrastructure development. Increase in consumer awareness regarding safety and convenience features provided by auto electronics in modern vehicles is bolstering demand, to which manufacturers are also responding in a positive manner. China has now become the global auto manufacturing hub, outpacing even established regions, such as the United States and Germany. Moreover, Asia-Pacific also has a highly developed electronics industry, with constant innovations being undertaken by companies to introduce highly sophisticated components that can enhance vehicle efficiency and performance. Environmental regulations in place are limiting the levels of vehicular emissions drastically, prompting a shift towards electric and hybrid vehicles, all of which contribute to the growing market for Automotive Electronics in the region.

#### Automotive Electronics Market Analysis by Component

By component, Current Carrying Devices account for the largest share of the global Automotive Electronics market, estimated at about 41% in 2024. As a rule, these components, such as connectors, switches, fuses and wiring harnesses, which are extensively utilized in the latest vehicles, are quite costly and essential for transmitting electrical power and signals all through a vehicle's electrical network. However, the demand for Electronic Control Units (ECUs) is likely to record the fastest CAGR during the 2024-2030 analysis period. These devices are used for monitoring and adjusting engine operations, such as fuel injection timing, ignition timing & air-fuel ratio, which maximize fuel efficiency and ensure that regulatory emission standards are adhered to. In electric vehicles, ECUs play a critical role in managing and optimizing the powertrain and energy management systems, such as battery control, motor control and regenerative braking.

#### Automotive Electronics Market Analysis by Application

Application-wise, the global market for Automotive Electronics in Powertrain Systems is the largest, as these can cover all types of powertrains, such as internal combustion engine (ICE), electric and hybrid vehicles. A vehicle's powertrain comprises all the components that generate power and deliver it to the vehicle for smooth operation. The heavy demand for Automotive Electronics in this area can be attributed to the ongoing transition to electric and hybrid vehicles that need sophisticated electronics for efficient power management, battery control and energy recovery systems. Further impetus to the demand is being provided by innovations in powertrain technology with the target of improving fuel efficiency and reducing emissions. As regards growth, though, the worldwide market for Automotive Electronics in Advanced Driver Assistance Systems (ADAS) will be the fastest. This system typically comprises advanced electronic components, such as cameras, radars and sensors used for monitoring road conditions, alerting drivers and also autonomously managing braking and steering in some cases. The implementation of stringent safety regulations by governments and regulatory bodies aimed at minimizing accidents and enhancing road safety has speeded up the adoption of ADAS in vehicles of all varieties.

#### Automotive Electronics Market Analysis by Vehicle Type

The global Automotive Electronics demand by vehicle type is dominated by Passenger Cars, which will also clock the fastest growth over the analysis period. This can be attributed to the increasing incorporation of advanced electronic systems in passenger vehicles with the goal of improving safety, efficiency and comfort. Consumers of today need a car equipped with connectivity, infotainment and advanced driver assistance systems (ADAS), apart from complying with stringent regulatory

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standards for safety and emissions. Electric and hybrid passenger cars are now becoming the norm, which further require these highly complex electronic control and battery management systems for efficient functioning.

#### Automotive Electronics Market Analysis by Fitting Type

OEM Fitted Automotive Electronics corner the larger share of the global demand, estimated at nearly 73% in 2024, and will also maintain the fastest growth. The primary reason for this is that a major proportion of the electronic components in a vehicle are included in the production stage itself to provide greater durability and longer life. The demand for advanced components is being driven by ongoing innovations by OEMs in electronic technologies for providing systems that can improve vehicle performance, safety and user experience. Aftermarket fitting of electronics in vehicles extends functionality and offers retrofitting options, hence its lower share. This segment, too, is crucial in offering upgrades, replacements and enhancements for existing vehicles, such as advanced infotainment systems, ADAS upgrades and electric vehicle conversion kits.

#### Automotive Electronics Market Report Scope

This global report on Automotive Electronics analyzes the global and regional markets based on component, application, vehicle type and fitting type for the period 2021-2030 with projections from 2024 to 2030 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

#### Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Value market in US\$

Companies Mentioned: 40+

#### Automotive Electronics Market by Geographic Region

☐☐ North America (The United States, Canada and Mexico)

☐☐ Europe (France, Germany, Italy, Russia, Spain, The United Kingdom and Rest of Europe)

☐☐ Asia-Pacific (China, Japan, India, South Korea and Rest of Asia-Pacific)

☐☐ South America (Argentina, Brazil and Rest of South America)

☐☐ Middle East & Africa

#### Automotive Electronics Market by Component

☐☐ Current Carrying Devices

☐☐ Electronic Control Units (ECUs)

☐☐ Sensors

☐☐ Other Components (Incl. Actuators, Controls, Displays, Integrated Circuits, Harnesses & Switches)

#### Automotive Electronics Market by Application

☐☐ Advanced Driver Assistance Systems (ADAS)

☐☐ Body Electronics

☐☐ Infotainment

☐☐ Powertrain Systems

☐☐ Safety & Security

☐☐ Other Applications (Fuel Injection, HVAC, Lighting & Tire Pressure Monitoring)

#### Automotive Electronics Market by Vehicle Type

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- Commercial Vehicles
- Passenger Cars
- Two & Three Wheelers

#### Automotive Electronics Market by Fitting Type

- Aftermarket Fitting
- OEM Fitting

### **Table of Contents:**

#### PART A: GLOBAL MARKET PERSPECTIVE

##### 1. Introduction

- Automotive Electronics Outline
  - Automotive Electronics Defined
  - o□Automotive Electronic Components
    - Current Carrying Devices
    - Electronic Control Units (ECUs)
    - Sensors
    - Other Components (Incl. Actuators, Controls, Displays, Integrated Circuits, Harnesses & Switches)
  - o□Automotive Electronics Applications
    - Advanced Driver Assistance Systems (ADAS)
    - Body Electronics Systems
    - Infotainment Systems
    - Powertrain Systems
    - Safety & Security Systems
    - Other Applications (Fuel Injection, HVAC, Lighting & Tire Pressure Monitoring)
  - o□Vehicle Types using Automotive Electronics
    - Commercial Vehicles
    - Passenger Cars
    - Two & Three Wheelers
  - o□Automotive Electronics Installation/Fitting Types
    - Aftermarket Fitting
    - OEM Fitting
- ##### 2. Key Market Trends
- ##### 3. Key Global Players
- Aisin Corporation
  - Alpine Electronics, Inc.
  - Altera Corporation
  - Analog Devices, Inc.
  - Aptiv PLC
  - Atmel Corporation
  - Atotech Deutschland GmbH
  - Audiovox
  - Autoliv, Inc.
  - Avago Technologies
  - BorgWarner, Inc.
  - Broadcom, Inc.

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- Continental AG
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- Delphi Automotive
- Delta Electronics, Inc.
- Denso Corporation
- Faurecia SA
- Harman International Industries, Inc.
- Hella GmbH & Co. KgaA
- HGM Automotive Electronics
- Hitachi Automotive Systems Ltd.
- Hyundai Mobis Co Ltd.
- Infineon Technologies AG
- Lear Corporation
- Magna International, Inc.
- Marelli Holdings Co Ltd
- Microchip Technology, Inc.
- Mitsubishi Electric Corporation
- NVIDIA Corp
- NXP Semiconductors NV
- Omron Corp
- Panasonic Corp
- Philips NV
- Pioneer Corp
- REDARC Electronics
- Renesas Electronics Corp
- Robert Bosch GmbH
- Sony Corp
- STMicroelectronics NV
- Texas Instruments, Inc.
- Tokai Rika Co Ltd
- Toyoda Gosei Co Ltd
- TRW Automotive
- Valeo SA
- Visteon Corp
- Xilinx, Inc.
- Yazaki Corporation
- ZF Friedrichshafen AG

#### 4. Key Business & Product Trends

#### 5. Global Market Overview

- Global Automotive Electronics Market Overview by Component
- o□Automotive Electronics Component Market Overview by Global Region
- Current Carrying Devices
- Electronic Control Units (ECUs)
- Sensors
- Other Components (Incl. Actuators, Controls, Displays, Integrated Circuits, Harnesses & Switches)
- o□Automotive Electronics Market by Application
- Advanced Driver Assistance Systems (ADAS)

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- Body Electronics Systems
- Infotainment Systems
- Powertrain Systems
- Safety & Security Systems
- Other Applications (Fuel Injection, HVAC, Lighting & Tire Pressure Monitoring)

o□Automotive Electronics Market by Vehicle Type

- Commercial Vehicles
- Passenger Cars
- Two & Three Wheelers

o□Global Automotive Electronics Market Overview by Fitting Type

- Aftermarket Fitting
- OEM Fitting

PART B: REGIONAL MARKET PERSPECTIVE

- Global Automotive Electronics Market Overview by Geographic Region

REGIONAL MARKET OVERVIEW

6. North America

- North American Automotive Electronics Market Overview by Geographic Region
- North American Automotive Electronics Market Overview by Component
- North American Automotive Electronics Market Overview by Application
- North American Automotive Electronics Market Overview by Vehicle Type
- North American Automotive Electronics Market Overview by Fitting Type
- Country-wise Analysis of North American Automotive Electronics Market

o□The United States

- United States Automotive Electronics Market Overview by Component
- United States Automotive Electronics Market Overview by Application
- United States Automotive Electronics Market Overview by Vehicle Type
- United States Automotive Electronics Market Overview by Fitting Type

o□Canada

- Canadian Automotive Electronics Market Overview by Component
- Canadian Automotive Electronics Market Overview by Application
- Canadian Automotive Electronics Market Overview by Vehicle Type
- Canadian Automotive Electronics Market Overview by Fitting Type

o□Mexico

- Mexican Automotive Electronics Market Overview by Component
- Mexican Automotive Electronics Market Overview by Application
- Mexican Automotive Electronics Market Overview by Vehicle Type
- Mexican Automotive Electronics Market Overview by Fitting Type

7. Europe

- European Automotive Electronics Market Overview by Geographic Region
- European Automotive Electronics Market Overview by Component
- European Automotive Electronics Market Overview by Application
- European Automotive Electronics Market Overview by Vehicle Type
- European Automotive Electronics Market Overview by Fitting Type
- Country-wise Analysis of European Automotive Electronics Market

o□France

- French Automotive Electronics Market Overview by Component
- French Automotive Electronics Market Overview by Application

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- French Automotive Electronics Market Overview by Vehicle Type
- French Automotive Electronics Market Overview by Fitting Type
- o□Germany
  - German Automotive Electronics Market Overview by Component
  - German Automotive Electronics Market Overview by Application
  - German Automotive Electronics Market Overview by Vehicle Type
  - German Automotive Electronics Market Overview by Fitting Type
- o□Italy
  - Italian Automotive Electronics Market Overview by Component
  - Italian Automotive Electronics Market Overview by Application
  - Italian Automotive Electronics Market Overview by Vehicle Type
  - Italian Automotive Electronics Market Overview by Fitting Type
- o□Russia
  - Russian Automotive Electronics Market Overview by Component
  - Russian Automotive Electronics Market Overview by Application
  - Russian Automotive Electronics Market Overview by Vehicle Type
  - Russian Automotive Electronics Market Overview by Fitting Type
- o□Spain
  - Spanish Automotive Electronics Market Overview by Component
  - Spanish Automotive Electronics Market Overview by Application
  - Spanish Automotive Electronics Market Overview by Vehicle Type
  - Spanish Automotive Electronics Market Overview by Fitting Type
- o□The United Kingdom
  - United Kingdom Automotive Electronics Market Overview by Component
  - United Kingdom Automotive Electronics Market Overview by Application
  - United Kingdom Automotive Electronics Market Overview by Vehicle Type
  - United Kingdom Automotive Electronics Market Overview by Fitting Type
- o□Rest of Europe
  - Rest of Europe Automotive Electronics Market Overview by Component
  - Rest of Europe Automotive Electronics Market Overview by Application
  - Rest of Europe Automotive Electronics Market Overview by Vehicle Type
  - Rest of Europe Automotive Electronics Market Overview by Fitting Type
- 8. Asia-Pacific
  - Asia-Pacific Automotive Electronics Market Overview by Geographic Region
  - Asia-Pacific Automotive Electronics Market Overview by Component
  - Asia-Pacific Automotive Electronics Market Overview by Application
  - Asia-Pacific Automotive Electronics Market Overview by Vehicle Type
  - Asia-Pacific Automotive Electronics Market Overview by Fitting Type
  - Country-wise Analysis of Asia-Pacific Automotive Electronics Market
- o□China
  - Chinese Automotive Electronics Market Overview by Component
  - Chinese Automotive Electronics Market Overview by Application
  - Chinese Automotive Electronics Market Overview by Vehicle Type
  - Chinese Automotive Electronics Market Overview by Fitting Type
- o□India
  - Indian Automotive Electronics Market Overview by Component
  - Indian Automotive Electronics Market Overview by Application

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- Indian Automotive Electronics Market Overview by Vehicle Type
- Indian Automotive Electronics Market Overview by Fitting Type
- o□Japan
- Japanese Automotive Electronics Market Overview by Component
- Japanese Automotive Electronics Market Overview by Application
- Japanese Automotive Electronics Market Overview by Vehicle Type
- Japanese Automotive Electronics Market Overview by Fitting Type
- o□South Korea
- South Korean Automotive Electronics Market Overview by Component
- South Korean Automotive Electronics Market Overview by Application
- South Korean Automotive Electronics Market Overview by Vehicle Type
- South Korean Automotive Electronics Market Overview by Fitting Type
- o□Rest of Asia-Pacific
- Rest of Asia-Pacific Automotive Electronics Market Overview by Component
- Rest of Asia-Pacific Automotive Electronics Market Overview by Application
- Rest of Asia-Pacific Automotive Electronics Market Overview by Vehicle Type
- Rest of Asia-Pacific Automotive Electronics Market Overview by Fitting Type
- 9. South America
- South American Automotive Electronics Market Overview by Geographic Region
- South American Automotive Electronics Market Overview by Component
- South American Automotive Electronics Market Overview by Application
- South American Automotive Electronics Market Overview by Vehicle Type
- South American Automotive Electronics Market Overview by Fitting Type
- Country-wise Analysis of South American Automotive Electronics Market
- o□Argentina
- Argentine Automotive Electronics Market Overview by Component
- Argentine Automotive Electronics Market Overview by Application
- Argentine Automotive Electronics Market Overview by Vehicle Type
- Argentine Automotive Electronics Market Overview by Fitting Type
- o□Brazil
- Brazilian Automotive Electronics Market Overview by Component
- Brazilian Automotive Electronics Market Overview by Application
- Brazilian Automotive Electronics Market Overview by Vehicle Type
- Brazilian Automotive Electronics Market Overview by Fitting Type
- o□Rest of South America
- Rest of South American Automotive Electronics Market Overview by Component
- Rest of South American Automotive Electronics Market Overview by Application
- Rest of South American Automotive Electronics Market Overview by Vehicle Type
- Rest of South American Automotive Electronics Market Overview by Fitting Type
- 10. Middle East & Africa
- Middle East & Africa Automotive Electronics Market Overview by Component
- Middle East & Africa Automotive Electronics Market Overview by Application
- Middle East & Africa Automotive Electronics Market Overview by Vehicle Type
- Middle East & Africa Automotive Electronics Market Overview by Fitting Type

PART C: GUIDE TO THE INDUSTRY

PART D: ANNEXURE

1. RESEARCH METHODOLOGY

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