

## **Connected Car Devices - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Connected Car Devices Market Analysis

The Connected Car Devices Market size is estimated at USD 63.27 billion in 2025, and is expected to reach USD 126.32 billion by 2030, at a CAGR of 14.83% during the forecast period (2025-2030). Demand stems from rapid 5G roll-outs, new e-Call and ADAS mandates, and the shift toward software-defined vehicles that rely on seamless connectivity. OEMs view embedded modules as the backbone for subscription services and data monetization, with potential revenue of USD 1,600 per vehicle from connected offerings. Growth is bolstered by the spread of cellular vehicle-to-everything (C-V2X) standards and edge AI chipsets that lower latency for safety-critical functions.

Global Connected Car Devices Market Trends and Insights

Rapid 5G Roll-Out and Carrier-OEM Partnerships

Automotive 5G connections are forecast to grow exponentially in enablement revenues by 2027. Cisco and TELUS already provision more than 1.5 million 5G vehicles on automated platforms, cutting latency to near-real-time levels critical for autonomous features. Partnerships now bundle connectivity, edge computing, and developer tools into unified offerings that let OEMs launch new services faster. These alliances change the supplier landscape because carriers shift from bandwidth providers to strategic technology partners. The resulting service platforms underpin premium infotainment, remote diagnostics, and high-definition maps, supporting higher average revenue per user.

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## Mandatory E-Call and ADAS Regulations

The National Highway Traffic Safety Administration requires automatic emergency braking with pedestrian detection on all light vehicles by September 2029, carrying USD 354 million in annual compliance costs and lifetime benefits topping USD 5.82 billion. Europe enforces e-Call and a suite of driver-assistance functions under the General Safety Regulation, while China scales vehicle-road-cloud pilots with more than 7,000 5G-A base stations in Beijing. These mandates remove uncertainty around timelines, prompting OEMs to integrate connected sensors as standard equipment. Suppliers benefit from predictable volumes, and consumers gain universal safety features that lower accident rates.

## Cyber-Security Vulnerabilities and Recalls

The Pwn2Own Automotive 2024 contest exposed a zero-click exploit in Alpine's Halo9 infotainment unit with a 96% success rate, highlighting the ease of remote compromise. Software-related recalls affected over 30 million vehicles in 2023, and the NIST-listed CVE-2023-6248 flaw enables full device takeover of popular telematics gateways. As vehicles become rolling data centres, their attack surface expands, raising the cost of post-sale patches and reputational damage. Regulators demand security-by-design, pushing suppliers to embed hardware root-of-trust, secure over-the-air frameworks, and continuous penetration testing.

Other drivers and restraints analyzed in the detailed report include:

Subscription-Based Revenue Targets / Edge AI Chips for In-Vehicle Inferencing / High BOM Cost of Multi-Band V2X Modules /

For complete list of drivers and restraints, kindly check the Table Of Contents.

## Segment Analysis

OEM installations captured 63.27% of the connected car devices market share in 2024 because factory-fitted hardware integrates deeply with vehicle diagnostics, power management, and warranty frameworks. Automakers embed modules during assembly to ensure compliance with e-Call and ADAS mandates, streamline over-the-air upgrades, and bolster brand control over data. Growing reliance on software-defined architectures cements this channel's leadership as OEMs link connectivity to revenue-generating services such as remote feature activation and predictive maintenance.

However, aftermarket providers are expanding quickly, with a 15.74% CAGR, as insurers and fleet managers retrofit legacy assets. Plug-and-play dongles and hardwired black boxes supply real-time usage data that underpins behaviour-based premiums and asset tracking. HARMAN's ready-upgrade kits exemplify solutions tailored for mixed fleets needing installation speed and cross-brand compatibility. While OEM control remains strong, price-sensitive owners and commercial operators continue to drive a parallel aftermarket, ensuring competitive variety within the connected car devices market.

Vehicle-to-vehicle links represented 39.62% of the connected car devices market revenue share in 2024 because they deliver collision warnings without requiring roadside units. Mature standards and demonstrated safety gains encourage OEMs to adopt V2V first, particularly in high-volume models aiming for five-star safety ratings. Retrofits also proliferate in commercial fleets where forward-collision alerts cut downtime and insurance costs.

Vehicle-to-grid capability is projected to post a 15.12% CAGR to 2030 as energy utilities partner with automakers to stabilise renewable-heavy grids. Bidirectional chargers paired with connectivity let electric cars feed stored power back to the network, creating new revenue for owners and grid operators. Growth in vehicle-to-infrastructure and vehicle-to-pedestrian segments follows smart-city spending, yet these depend on broader public investment. Over time, integrated V2X suites will blend all

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modes, but V2V will remain the cornerstone while ecosystems mature around it.

The Connected Car Devices Market Report is Segmented by End-User Type (OEM and Aftermarket), Communication Type (V2V, V2I, and More), Product Type (Driver Assistance System (DAS), Telematics, and More), Connectivity Technology (Embedded, Integrated, and More), Vehicle Propulsion Type (IC Engine and Electric), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

## Geography Analysis

North America accounted for 38.73% of the connected car devices market share in 2024. Uptake is driven by federal funding under the Infrastructure Investment and Jobs Act and consumer appetite for premium SUVs brimming with ADAS, high-definition infotainment, and 5G hotspots. Ongoing pilots with the U.S. Department of Transportation and the 5G Automotive Association boost confidence in C-V2X, while tight cybersecurity and privacy rules shape procurement specifications. Canada and Mexico benefit from integrated supply chains, enabling regional OEM plants to standardise connected modules and software stacks. These factors sustain healthy replacement cycles and after-sales subscriptions across North America.

Asia-Pacific is on track for the fastest 15.37% CAGR to 2030. China's vehicle-road-cloud blueprint anchors public and private spending, with Beijing alone hosting more than 7,000 5G-A base stations for intelligent mobility. Domestic brands embed connectivity to differentiate in a crowded electric-vehicle arena, while regional suppliers deliver cost-optimised telematics for two-wheelers and microcars. Japan and South Korea leverage chip-making prowess and early 5G roll-outs to test next-generation C-V2X sidelink features. India emerges as a high-volume opportunity as safety norms tighten and smartphone-savvy buyers demand always-on infotainment, though price sensitivity keeps tethered solutions relevant.

Europe maintains steady momentum under harmonised regulations such as mandatory e-Call and the General Safety Regulation. Germany, the United Kingdom, and France lead adoption as luxury marques bundle connectivity into premium trim lines, and mid-range brands follow suit. Energy-efficiency and carbon-reduction goals drive interest in vehicle-to-grid pilots that align EV charging with renewable output. Strict data sovereignty laws influence cloud-hosting choices, giving European-based providers an edge. Pan-EU standards for cybersecurity certification are under development, promising to streamline cross-border homologation and further stimulate the connected car devices market.

## List of Companies Covered in this Report:

Continental AG / Robert Bosch GmbH / Denso Corporation / ZF Friedrichshafen AG / Harman International / Valeo SA / Magna International / Panasonic Corp. / Visteon Corp. / Autoliv Inc. / Infineon Technologies AG / Autotalks Ltd. / Qualcomm Inc. / NXP Semiconductors / NVIDIA Corp. / Sierra Wireless / Cisco Systems / Huawei Technologies / AT&T / Verizon / Vodafone Group / Ericsson / LG Electronics / Telit /

## Additional Benefits:

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

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