In-vehicle Infotainment Market by Component (Infotainment Unit, HUD, Passenger Display, Digital IC), Application (Navigation, VPA, App Store, Music, Rear Seat), OS, Connectivity, Form Factor, Display Size, Location, ICE & EV, and Region - Global Forecast to 2032

Market Report | 2026-01-19 | 340 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User $4950.00
- Multi User $6650.00
- Corporate License $8150.00
- Enterprise Site License $10000.00

Report description:

The in-vehicle infotainment market is projected to grow from USD 23.07 billion in 2025 to USD 40.49 billion by 2032 at a CAGR of 8.4%. The increasing demand for connected and premium vehicles from European countries, such as Germany, Italy, and the UK, combined with the expanding integration of advanced driver information and entertainment features, as well as stronger customer preference for enhanced in-cabin digital experiences, will accelerate market growth. The Asia Pacific market for in-vehicle infotainment is expanding as China, South Korea, and Japan scale premium and premium EV products. In addition, the rapid deployment of 5G, strong consumer adoption of connected services, and government-backed intelligent mobility programs are accelerating infotainment adoption across vehicle segments, particularly in passenger cars, driven by the growth in in-vehicle infotainment.

https://mnmimg.marketsandmarkets.com/Images/in-car-vehicle-infotainment-ici-systems-market-img-overview.webp

"The infotainment unit segment is projected to lead the in-vehicle infotainment market during the forecast period."
By component, the infotainment unit segment is projected to remain the dominant segment as OEMs accelerate the move toward mid- to large-size integrated digital displays across medium to high-end passenger and light-duty vehicles. In developing Asian markets, display sizes typically scale with vehicle price bracket: 3-5 inches in entry-level cars, 8-10 inches in the mid-segment, and above 12 inches in premium models. Larger central screens (> 10") are gaining strong traction because they enable a richer, more smartphone-like interface while supporting the growing shift of navigation, media, vehicle functions, smart apps, and even

specific ADAS overlays into digital form. For mid-priced cars, offering an 8-10.25" display unit also delivers a cost-effective 'premium feel', boosting perceived value without major interior redesigns. Furthermore, premium and luxury models are simultaneously driving growth in multi-screen cabins, especially rear-seat infotainment systems. These high-resolution displays enable streaming, gaming, and seamless device integration, and their adoption is quite prominent in regions with higher premium-vehicle penetration, such as Europe and North America. The rising adoption of digital fleet-management systems is prompting OEMs to integrate larger, more capable displays in the pickup, van, and heavy truck segments.

Pillar-to-pillar displays are becoming a key cockpit trend in premium vehicles, enabled by centralized computers and high-performance automotive SoCs. By integrating the instrument cluster and infotainment systems into a single, continuous screen, OEMs can enhance HMI richness, real-time visualization, and software-led differentiation. Examples include Mercedes-Benz MBUX Hyperscreen and next-generation panoramic display concepts from BMW (Panoramic iDrive) and leading Chinese EV OEMs. Additionally, passenger displays are evolving as a distinct in-cabin experience layer, supporting media consumption, gaming, and digital services while remaining compliant with driver-distraction regulations. OEMs such as Mercedes-Benz, Audi, and Hyundai-Kia are positioning these displays as revenue-generating interfaces through connected services and OTA-enabled feature upgrades.

As larger and more numerous screens in vehicles are increasingly viewed as an extension of a connected, digital lifestyle, and rear-seat infotainment systems are designed for intuitive control, multi-functionality, and enhanced passenger comfort, the infotainment unit segment is projected to continue dominating the components market by 2032.

"The embedded segment is projected to grow at the highest rate in the in-vehicle infotainment market during the forecast period."

By form factor, the embedded segment is poised to be the fastest-growing segment in the in-vehicle infotainment market during the forecast period. This is primarily due to the increasing integration of OEM-fitted units in SUVs and mid-range passenger vehicles. Automakers are increasingly standardizing embedded platforms across their vehicle lineups, offering features such as 4G/5G connectivity, ADAS-linked human-machine interfaces, head-up displays, and manufacturer-grade navigation systems. This approach ensures consistent performance, seamless integration, and secure delivery of infotainment functions across models. Regulatory changes are further driving the adoption of embedded infotainment systems across regions. For example, in Europe, requirements like eCall expansion, cybersecurity compliance (UNECE R155), and updated software update mandates (UNECE R156) encourage OEMs to implement embedded systems capable of managing emergency services, over-the-air updates, and safety-critical applications reliably. Similarly, in North America, the 2024 NHTSA mandate for automatic emergency braking (FMVSS 127) underscores the importance of seamless integration between infotainment and safety alerts.

With consumer demand for connected, digitally rich cabins on the rise, advances in embedded technology, including 5G connectivity, AI-driven voice control, and cloud-based navigation, are expected to drive the strong growth of embedded infotainment units during the forecast period.

"North America is projected to be the second-largest market for in-vehicle infotainment during the forecast period."

North America remains the second-largest regional market, supported by strong demand for mid- and full-size SUVs and pickup trucks in the US and Canada, higher disposable incomes, and rapid adoption of connected-vehicle features. Automotive OEMs, such as Ford, General Motors, Toyota, Hyundai-Kia, and Tesla, are integrating advanced HMIs, cloud-based navigation, voice-driven interfaces, and OTA-enabled cockpit systems into their mainstream models. The regulatory framework is also shaping this growth, with the 2024 NHTSA mandate requiring automatic emergency braking with pedestrian detection for all light vehicles. As a result, OEMs are accelerating the integration of enhanced digital displays, sensor-fusion alert layers, and real-time ADAS feedback into their infotainment clusters. Additionally, the increasing amount of time drivers spend in vehicles, averaging nearly an hour per day in the US, further reinforces the demand for more capable, intuitive, and connected in-car systems. Moreover, newly launched electric and premium models, such as the Ford F-150 Lightning, Mercedes-Benz GLC, Hyundai Ioniq 6, and BMW i7, demonstrate the shift toward multi-screen layouts, AI-enabled voice assistants, app-store-style ecosystems, and seamless phone-to-vehicle continuity.

Furthermore, the region is witnessing a more substantial uptake of larger central displays, fully digital clusters, co-passenger screens, and integrated infotainment-ADAS interface-features that are increasingly expected, even in mid-segment SUVs. Together, these technological and regulatory forces will continue to strengthen the demand for the in-vehicle infotainment market across the region through the forecast period.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.
- By Company Type: In-vehicle Infotainment Suppliers - 45%, Automotive OEMs - 35%, and Others - 20%
- By Designation: C-Level - 35%, Directors - 35%, and Others - 30%
- By Region: Asia Pacific - 65%, Europe - 10%, and North America - 25%

The in-vehicle Infotainment market is led by established players, such as Harman International (US), Panasonic Corporation (Japan), Alps Alpine Co., Ltd. (Japan), Robert Bosch GmbH (Germany), and Continental AG (Germany).

Research Coverage:

The study segments the in-vehicle infotainment market and forecasts the market size based on ICE Vehicle Type (Passenger Car, Light Commercial Vehicle, and Heavy Commercial Vehicle), Component (Infotainment Unit, Passenger Display, Display Instrument Cluster, and Head-Up Display), Operating System (Android, Linux, QNX, Microsoft, and Others), Application [Navigation, Virtual Personal Assistant (VPA), App Store, Music, and Rear Seat], Location (Front Row and Rear Row), Connectivity (3G/4G and 5G), Form (Embedded, Tethered, and Integrated), Display Size (< 5", 5"-10", and > 10"), Retrofit by Vehicle Type (Passenger Car and Commercial Vehicle), Electric Vehicle by Vehicle Type (Battery Electric Vehicle, Plug-in Hybrid Electric Vehicle, and Fuel-Cell Electric Vehicle), and Region (Asia Pacific, North America, Europe, and the Rest of the World).

The study includes an in-depth competitive analysis of the significant In-vehicle infotainment manufacturers, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the overall In-vehicle infotainment market and its sub-segments. This report will help stakeholders understand the competitive landscape and gain valuable insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insight into the following points:
- Analysis of key drivers (Expansion of connected and intelligent in-cabin ecosystem enhancing Safety, Comfort, and Experience, increase in demand for rear-seat entertainment, expansion of the global smartphone ecosystem and integration of cloud-based connectivity), restraints (Additional cost of annual subscriptions in infotainment systems, lack of seamless connectivity fragmented operating systems (Android Automotive, QNX, AGL), opportunities (Government mandates on telematics and e-call services; emergence of technologies such as 5G and AI), and challenges (Cybersecurity challenge)

- Product Development/Innovation: Insights into next-generation IVI platforms, AI-enabled human-machine interfaces, multi-display cockpits, and software-defined infotainment architectures

- Market Development: Analysis of demand trends across North America, Europe, and Asia Pacific driven by connected vehicle adoption, regulatory requirements, and rising consumer expectations for digital experiences

- Market Diversification: Evaluation of infotainment solutions across passenger cars, commercial vehicles, and electric vehicles, including opportunities in subscription-based services and cloud-enabled features

- Competitive Assessment: In-depth assessment of market positioning, technology focus, and growth strategies of key players, such as ALPS ALPINE CO., LTD. (Japan), Garmin (US), Pioneer Corporation (Japan), Harman International (US), and Panasonic Corporation (Japan).

Table of Contents:

1 INTRODUCTION 31
1.1 STUDY OBJECTIVES 31
1.2 MARKET DEFINITION 31

1.2.1 INCLUSIONS AND EXCLUSIONS 32
1.3 MARKET SCOPE 33
1.3.1 YEARS CONSIDERED 34
1.4 CURRENCY CONSIDERED 34
1.5 STAKEHOLDERS 35
1.6 SUMMARY OF CHANGES 35
2 EXECUTIVE SUMMARY 36
2.1 KEY INSIGHTS AND MARKET HIGHLIGHTS 36
2.2 KEY MARKET PARTICIPANTS: SHARE INSIGHTS AND STRATEGIC DEVELOPMENTS 37
2.3 DISRUPTIVE TRENDS SHAPING MARKET 38
2.4 HIGH-GROWTH SEGMENTS AND EMERGING FRONTIERS 39
2.5 SNAPSHOT: GLOBAL MARKET SIZE, GROWTH RATE, AND FORECAST 40
3 PREMIUM INSIGHTS 41
3.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN IN-VEHICLE INFOTAINMENT MARKET 41
3.2 IN-VEHICLE INFOTAINMENT MARKET, BY FORM 41
3.3 IN-VEHICLE INFOTAINMENT MARKET, BY COMPONENT 42
3.4 IN-VEHICLE INFOTAINMENT MARKET, BY LOCATION 42
3.5 IN-VEHICLE INFOTAINMENT MARKET, BY OPERATING SYSTEM (OS) 43
3.6 IN-VEHICLE INFOTAINMENT MARKET, BY APPLICATION 43
3.7 IN-VEHICLE INFOTAINMENT MARKET, BY ICE VEHICLE TYPE 44
3.8 IN-VEHICLE INFOTAINMENT MARKET, BY CONNECTIVITY 44
3.9 ELECTRIC VEHICLE INFOTAINMENT MARKET, BY VEHICLE TYPE 45
3.10 IN-VEHICLE INFOTAINMENT RETROFIT MARKET, BY VEHICLE TYPE 45
3.11 IN-VEHICLE INFOTAINMENT RETROFIT MARKET, BY DISPLAY SIZE 46
3.12 IN-VEHICLE INFOTAINMENT MARKET, BY REGION 46
4 MARKET OVERVIEW 47
4.1 INTRODUCTION 47
4.2 MARKET DYNAMICS 48
4.2.1 DRIVERS 48
4.2.1.1 Expansion of connected and intelligent in-cabin ecosystems enhancing safety, comfort, and experience 48
4.2.1.2 Increase in demand for rear-seat entertainment 49
4.2.1.3 Expansion of global smartphone ecosystem and integration of cloud-based connectivity 50
4.2.2 RESTRAINTS 50
4.2.2.1 Additional cost of annual subscriptions in infotainment systems 50
4.2.2.2 Lack of seamless connectivity 51
4.2.3 OPPORTUNITIES 51
4.2.3.1 Government mandates on telematics and e-call services 51
4.2.3.2 Emergence of 5G, AI, and other technologies 53
4.2.3.2.1 5G 53
4.2.3.2.2 AI 53
4.2.4 CHALLENGES 54
4.2.4.1 Cybersecurity issues 54
5 INDUSTRY TRENDS 55
5.1 SUPPLY CHAIN ANALYSIS 55
5.2 ECOSYSTEM ANALYSIS 56
5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 57
5.4 PRICING ANALYSIS 57

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

5.4.1 AVERAGE PRICE RANGE: IN-VEHICLE INFOTAINMENT SYSTEMS,
BY REGION, 2023 VS. 2024 (USD) 57
5.4.2 AVERAGE PRICE RANGE: IN-VEHICLE INFOTAINMENT SYSTEMS,
BY VEHICLE TYPE, 2023 VS. 2024 (USD) 58
5.4.3 AVERAGE PRICE RANGE: IN-VEHICLE INFOTAINMENT SYSTEMS,
BY COMPONENT, 2023 VS. 2024 (USD) 58
5.4.4 INDICATIVE PRICE TREND: IN-VEHICLE INFOTAINMENT SYSTEMS,
BY KEY PLAYERS, 2023 VS. 2024 (USD) 58
5.5 TRADE ANALYSIS 59
5.5.1 IMPORT SCENARIO, 2020-2024 59
5.5.2 EXPORT SCENARIO, 2020-2024 60
5.6 INVESTMENT AND FUNDING SCENARIO 62
5.7 KEY CONFERENCES AND EVENTS, 2026 63
5.8 CASE STUDY ANALYSIS 64
5.8.1 ACCURACY, TRACEABILITY, AND REPEATABILITY DRIVING BATTENBERG'S HAPTIC TESTING SUCCESS 64
5.8.2 VOLVO & POLESTAR'S ANDROID AUTOMOTIVE INFOTAINMENT PLATFORM BUILT WITH APTIV 65
5.8.3 AUTOSYNC - DESIGNING SAFER, SMARTER INFOTAINMENT DASHBOARD 66
5.8.4 SNAPP AUTOMOTIVE'S QUEST FOR EXCELLENCE IN IN-CAR LANGUAGE INPUT 67
5.8.5 APTERA DELIVERED WORLD'S MOST EFFICIENT ELECTRIC VEHICLE IN UNDER ONE YEAR 68
5.9 IN-VEHICLE INFOTAINMENT MARKET: OEM ANALYSIS 69
5.9.1 DISPLAY SIZES OF IN-VEHICLE INFOTAINMENT SYSTEMS, BY OEM 69
6 TECHNOLOGICAL ADVANCEMENTS, AI-DRIVEN IMPACT, PATENTS, INNOVATIONS, AND FUTURE APPLICATIONS 70
6.1 PATENT ANALYSIS 70
6.2 KEY EMERGING TECHNOLOGIES 75
6.2.1 PASSENGER DISPLAY 75
6.2.2 PILLAR-TO-PILLAR DISPLAY 76
6.2.3 SOFTWARE-DEFINED VEHICLE (SDV) 76
6.2.4 MONETIZATION & SERVICE-LAYER ECOSYSTEMS (IN-CAR PAYMENTS, SUBSCRIPTIONS, AND CONTENT STREAMING) 76
6.3 COMPLEMENTARY TECHNOLOGIES 77
6.3.1 CONNECTIVITY & TELEMATICS MODULES (TCUS, V2X, CLOUD INTEGRATION) 77
6.3.2 AUTOMOTIVE HUMAN-MACHINE INTERFACE (HMI) SYSTEMS 77
6.4 FUTURE APPLICATIONS 77
6.4.1 AI-DRIVEN COCKPIT ASSISTANTS 77
6.4.2 CROSS-DEVICE DIGITAL CONTINUITY 78
6.5 IMPACT OF AI/ GENERATIVE AI 78
6.5.1 TOP USE CASES AND MARKET POTENTIAL 78
7 SUSTAINABILITY AND REGULATORY LANDSCAPE 79
7.1 REGIONAL REGULATIONS AND COMPLIANCE 79
7.1.1 REGULATORY BODIES, GOVERNMENT AGENCIES,
AND OTHER ORGANIZATIONS 79
7.1.2 IN-VEHICLE INFOTAINMENT REGULATIONS/STANDARDS,
BY COUNTRY/REGION 81
8 CUSTOMER LANDSCAPE & BUYER BEHAVIOR 82
8.1 KEY STAKEHOLDERS IN BUYING PROCESS 82
8.2 BUYING CRITERIA 83
8.2.1 PASSENGER CARS 83
8.2.2 COMMERCIAL VEHICLES 83

9 IN-VEHICLE INFOTAINMENT MARKET, BY ICE VEHICLE TYPE 85
9.1 INTRODUCTION 86
9.2 PASSENGER CAR (PC) 87
9.2.1 GROWING CONSUMER PREFERENCE FOR CONNECTED,
PERSONALIZED CABIN EXPERIENCES TO DRIVE SEGMENTAL GROWTH 87
9.3 LIGHT COMMERCIAL VEHICLE (LCV) 89
9.3.1 DEMAND FOR CONNECTED COCKPIT SOLUTIONS TO DRIVE SEGMENTAL GROWTH 89
?
9.4 HEAVY COMMERCIAL VEHICLE (HCV) 91
9.4.1 DEMAND FOR INFOTAINMENT PLATFORMS THAT INTEGRATE NAVIGATION, ADVANCED TELEMATICS, ADAS INTERFACES, AND REAL-TIME FLEET MONITORING TO DRIVE SEGMENTAL GROWTH 91
9.5 PRIMARY INSIGHTS 92
10 ELECTRIC VEHICLE INFOTAINMENT MARKET, BY ELECTRIC VEHICLE (EV) TYPE 93
10.1 INTRODUCTION 94
10.2 BATTERY ELECTRIC VEHICLE (BEV) 96
10.2.1 INCREASING BEV SHIPMENTS TO DRIVE SEGMENTAL GROWTH 96
10.3 PLUG-IN HYBRID ELECTRIC VEHICLE (PHEV) 97
10.3.1 INCREASING SALES IN ASIA PACIFIC TO DRIVE SEGMENTAL GROWTH 97
10.4 FUEL CELL ELECTRIC VEHICLE (FCEV) 99
10.4.1 GROWING DEMAND FOR ALTERNATIVE FUEL VEHICLES TO DRIVE SEGMENTAL GROWTH 99
10.5 PRIMARY INSIGHTS 100
11 IN-VEHICLE INFOTAINMENT RETROFIT MARKET, BY VEHICLE TYPE 101
11.1 INTRODUCTION 102
11.2 PASSENGER CAR 103
11.2.1 INCREASING ADOPTION OF SMARTPHONE-INTEGRATED ECOSYSTEMS TO DRIVE SEGMENTAL GROWTH 103
11.3 COMMERCIAL VEHICLE 105
11.3.1 INVESTMENT IN SCALABLE AFTERMARKET INFOTAINMENT AND TELEMATICS UPGRADES TO DRIVE SEGMENTAL GROWTH 105
11.4 PRIMARY INSIGHTS 107
12 IN-VEHICLE INFOTAINMENT MARKET, BY APPLICATION 108
12.1 INTRODUCTION 109
12.2 NAVIGATION 110
12.2.1 INTEGRATION WITH TRAFFIC DATA TO DRIVE SEGMENTAL GROWTH 110
12.3 VIRTUAL PERSONAL ASSISTANT (VPA) 111
12.3.1 ENHANCED CONVENIENCE, SAFETY, AND CONNECTIVITY TO DRIVE SEGMENTAL GROWTH 111
12.4 APP STORE 112
12.4.1 GROWING OEM PARTNERSHIPS WITH SOFTWARE SUPPLIERS TO DRIVE SEGMENTAL GROWTH 112
12.5 MUSIC 113
12.5.1 SMARTPHONE INTEGRATION WITH VARIOUS MUSIC STREAMING APPLICATIONS TO DRIVE SEGMENTAL GROWTH 113
12.6 REAR-SEAT INFOTAINMENT 114
12.6.1 MEDLEY OF FEATURES IN REAR-SEAT INFOTAINMENT SYSTEMS TO DRIVE SEGMENTAL GROWTH 114
12.7 PRIMARY INSIGHTS 115
13 IN-VEHICLE INFOTAINMENT MARKET, BY COMPONENT 116
13.1 INTRODUCTION 117
13.2 INFOTAINMENT UNIT 118
13.2.1 SHIFT TOWARD RICHER NAVIGATION, SAFETY VISUALIZATION, VEHICLE DIAGNOSTICS, AND AI-DRIVEN INTERFACES TO DRIVE SEGMENTAL GROWTH 118
13.3 PASSENGER DISPLAY 120

13.3.1 AVAILABILITY OF PASSENGER DISPLAYS IN HIGH-SEGMENT VEHICLES TO DRIVE SEGMENTAL GROWTH 120
13.4 DIGITAL INSTRUMENT CLUSTER 122
13.4.1 TRANSITION TOWARD SOFTWARE-DEFINED ARCHITECTURE TO DRIVE SEGMENTAL GROWTH 122
13.5 HEAD-UP DISPLAY 123
13.5.1 SHIFT TO AR-ENABLED HUDS, INTEGRATED WITH ADVANCED SENSORS AND CONNECTED NAVIGATION TO DRIVE SEGMENTAL GROWTH 123
13.6 PRIMARY INSIGHTS 125
14 IN-VEHICLE INFOTAINMENT MARKET, BY CONNECTIVITY 126
14.1 INTRODUCTION 127
14.2 3G/4G 128
14.2.1 OPERATIONAL BACKBONE FOR MASS-MARKET AND MID-RANGE VEHICLES 128
14.3 5G 129
14.3.1 TO BECOME FOUNDATION FOR NEXT-GENERATION IN-VEHICLE INFOTAINMENT SYSTEMS 129
14.4 PRIMARY INSIGHTS 130
15 IN-VEHICLE INFOTAINMENT MARKET, BY DISPLAY SIZE 131
15.1 INTRODUCTION 132
15.2 <5" DISPLAY SIZE 133
15.2.1 SPACE AND COST MANAGEMENT IN VEHICLES TO DRIVE DEMAND 133
15.3 5"-10" DISPLAY SIZE 135
15.3.1 DEMAND FOR LUXURY FEATURES IN MID-TO-HIGH-END PASSENGER CAR SEGMENTS TO DRIVE GROWTH 135
15.4 >10" DISPLAY SIZE 137
15.4.1 INCREASED USE IN LUXURY CARS TO DRIVE DEMAND 137
15.5 PRIMARY INSIGHTS 138
16 IN-VEHICLE INFOTAINMENT MARKET, BY FORM 139
16.1 INTRODUCTION 140
16.2 EMBEDDED FORM 142
16.2.1 INCREASING DEMAND FOR CLOUD-ENABLED NAVIGATION, VEHICLE DIAGNOSTICS, AND SUBSCRIPTION-BASED SERVICES TO DRIVE SEGMENTAL GROWTH 142
?
16.3 TETHERED FORM 143
16.3.1 RISE OF APP-BASED NAVIGATION, MUSIC STREAMING, AND PAYMENT SERVICES TO DRIVE SEGMENTAL GROWTH 143
16.4 INTEGRATED FORM 145
16.4.1 EMPHASIS ON INTEGRATED CLUSTERS THAT CONSOLIDATE NAVIGATION, TELEMATICS, AND DRIVER-ASSIST INFORMATION TO DRIVE SEGMENTAL GROWTH 145
16.5 PRIMARY INSIGHTS 147
17 IN-VEHICLE INFOTAINMENT MARKET, BY LOCATION 148
17.1 INTRODUCTION 149
17.2 FRONT-ROW INFOTAINMENT SYSTEM 150
17.2.1 GROWING DEMAND FOR FRONT-ROW SYSTEMS THAT COMBINE ENTERTAINMENT WITH REAL-TIME DRIVING INTELLIGENCE TO DRIVE SEGMENTAL GROWTH 150
17.3 REAR-ROW INFOTAINMENT SYSTEM 152
17.3.1 INCREASING SALES OF LUXURY VEHICLES TO DRIVE SEGMENTAL GROWTH 152
17.4 PRIMARY INSIGHTS 153
18 IN-VEHICLE INFOTAINMENT MARKET, BY OPERATING SYSTEM 154
18.1 INTRODUCTION 155
18.2 LINUX 156
18.2.1 OPEN-SOURCE AND CUSTOMIZABLE 156

18.3QNX157
18.3.1STRONG ADOPTION IN PREMIUM AND COMMERCIAL SEGMENTS157
18.4ANDROID158
18.4.1SUPPORTS RICHER, SOFTWARE-DEFINED USER EXPERIENCES158
18.5OTHER OPERATING SYSTEMS159
18.5.1WIND RIVER160
18.5.2OEM/IN-HOUSE160
18.6PRIMARY INSIGHTS160
19IN-VEHICLE INFOTAINMENT MARKET, BY REGION161
19.1INTRODUCTION162
19.2ASIA PACIFIC164
19.2.1MACROECONOMIC OUTLOOK164
19.2.2CHINA169
19.2.2.1Rapid innovation cycles in smart cockpits to drive market169
19.2.2.2China: Vehicle production data169
19.2.3INDIA170
19.2.3.1Strong investments in semiconductor and electronics manufacturing to drive market170
19.2.3.2India: Vehicle production data171
?
19.2.4JAPAN172
19.2.4.1Regulatory push on ADAS, cybersecurity, and connected car data standards to drive market172
19.2.4.2Japan: Vehicle production data172
19.2.5SOUTH KOREA174
19.2.5.1Development of connected mobility infrastructure to drive market174
19.2.5.2South Korea: Vehicle production data174
19.2.6REST OF ASIA PACIFIC175
19.3EUROPE176
19.3.1MACROECONOMIC OUTLOOK177
19.3.2UK182
19.3.2.1Growing affordability of high-end vehicles to drive market182
19.3.2.2UK: Vehicle production data182
19.3.3GERMANY183
19.3.3.1Strong demand for premium vehicles to drive market183
19.3.3.2Germany: Vehicle production data183
19.3.4FRANCE185
19.3.4.1Heavy investments by OEMs in security technologies to drive market185
19.3.4.2France: Vehicle production data185
19.3.5SPAIN186
19.3.5.1Adoption of AI and cognitive computing to drive market186
19.3.5.2Spain: Vehicle production data186
19.3.6ITALY188
19.3.6.1Intelligent mobility infrastructure through large-scale C-ITS and smart city programs to drive market188
19.3.6.2Italy: Vehicle production data188
19.3.7RUSSIA189
19.3.7.1Growing adoption of embedded software systems to drive market189
19.3.7.2Russia: Vehicle production data190
19.3.8REST OF EUROPE191

19.3.8.1Rest of Europe: Vehicle production data191
19.4NORTH AMERICA192
19.4.1MACROECONOMIC OUTLOOK193
19.4.2US197
19.4.2.1Growing reliance on real-time navigation, streaming, diagnostics, and AI-based driver-assist functions to drive market197
19.4.2.2US: Vehicle production data197
19.4.3CANADA198
19.4.3.1Growing demand for reliable navigation, diagnostics,
and OTA-enabled infotainment platforms to drive market198
19.4.3.2Canada: Vehicle production data199
19.4.4MEXICO200
19.4.4.1Shift toward electric and software-defined vehicles to drive market200
19.4.4.2Mexico: Vehicle production data200
19.5REST OF THE WORLD (ROW)202
19.5.1MACROECONOMIC OUTLOOK202
19.5.2BRAZIL205
19.5.2.1Development of low-cost infotainment units to drive market205
19.5.2.2Brazil: Vehicle production data205
19.5.3SOUTH AFRICA207
19.5.3.1Establishment of advanced product testing and automotive homologation centers to drive market207
19.5.3.2South Africa: Vehicle production data207
19.5.4OTHERS209
19.5.4.1Others: Vehicle production data209
19.6PRIMARY INSIGHTS210
20COMPETITIVE LANDSCAPE211
20.1OVERVIEW211
20.2KEY PLAYER STRATEGIES/RIGHT TO WIN, 2023-2025211
20.3MARKET SHARE ANALYSIS, 2024213
20.4REVENUE ANALYSIS OF KEY PLAYERS, 2020-2024215
20.5COMPANY VALUATION & FINANCIAL METRICS, 2024216
20.5.1COMPANY VALUATION216
20.5.2FINANCIAL METRICS217
20.6BRAND/PRODUCT COMPARISON218
20.7COMPANY EVALUATION MATRIX: IN-VEHICLE INFOTAINMENT KEY PLAYERS, 2024219
20.7.1STARS219
20.7.2EMERGING LEADERS219
20.7.3PERVASIVE PLAYERS219
20.7.4PARTICIPANTS219
20.7.5COMPANY FOOTPRINT221
20.8COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024223
20.8.1PROGRESSIVE COMPANIES223
20.8.2RESPONSIVE COMPANIES223
20.8.3DYNAMIC COMPANIES223
20.8.4STARTING BLOCKS223
20.8.5COMPETITIVE BENCHMARKING225
20.8.5.1List of startups/SMEs225
20.8.5.2Competitive benchmarking of startups/SMEs226

20.9	COMPETITIVE SCENARIO	227
20.9.1	PRODUCT LAUNCHES	227
20.9.2	DEALS	233
20.9.3	OTHER DEVELOPMENTS	242
?
21	COMPANY PROFILES	243
21.1	KEY PLAYERS	243
21.1.1	ALPS ALPINE CO., LTD.	243
21.1.1.1	Business overview	243
21.1.1.2	Products offered	244
21.1.1.3	Recent developments	245
21.1.1.3.1	Product launches	245
21.1.1.3.2	Deals	246
21.1.1.3.3	Expansions	247
21.1.1.4	MnM view	247
21.1.1.4.1	Right to win	247
21.1.1.4.2	Strategic choices	247
21.1.1.4.3	Weaknesses & competitive threats	247
21.1.2	GARMIN LTD	248
21.1.2.1	Business overview	248
21.1.2.2	Products offered	249
21.1.2.3	Recent developments	250
21.1.2.3.1	Product launches	250
21.1.2.3.2	Deals	252
21.1.2.4	MnM view	253
21.1.2.4.1	Right to win	253
21.1.2.4.2	Strategic choices	253
21.1.2.4.3	Weaknesses & competitive threats	253
21.1.3	PIONEER CORPORATION	254
21.1.3.1	Business overview	254
21.1.3.2	Products offered	255
21.1.3.3	Recent developments	257
21.1.3.3.1	Product launches	257
21.1.3.3.2	Deals	258
21.1.3.3.3	Expansions	259
21.1.3.4	MnM view	260
21.1.3.4.1	Right to win	260
21.1.3.4.2	Strategic choices	260
21.1.3.4.3	Weaknesses and competitive threats	260
21.1.4	HARMAN INTERNATIONAL	261
21.1.4.1	Business overview	261
21.1.4.2	Products offered	262
21.1.4.3	Recent developments	264
21.1.4.3.1	Product launches	264
21.1.4.3.2	Deals	266
21.1.4.3.3	Expansions	267
?

21.1.4.4 MnM view 268
21.1.4.4.1 Right to win 268
21.1.4.4.2 Strategic choices 268
21.1.4.4.3 Weaknesses & competitive threats 268
21.1.5 PANASONIC CORPORATION 269
21.1.5.1 Business overview 269
21.1.5.2 Products offered 270
21.1.5.3 Recent developments 272
21.1.5.3.1 Product launches 272
21.1.5.3.2 Deals 272
21.1.5.3.3 Other developments 273
21.1.5.4 MnM view 273
21.1.5.4.1 Right to win 273
21.1.5.4.2 Strategic choices 273
21.1.5.4.3 Weaknesses & competitive threats 273
21.1.6 ROBERT BOSCH GMBH 274
21.1.6.1 Business overview 274
21.1.6.2 Products offered 275
21.1.6.3 Recent developments 276
21.1.6.3.1 Product launches 276
21.1.6.3.2 Deals 277
21.1.7 MITSUBISHI ELECTRIC CORPORATION 278
21.1.7.1 Business overview 278
21.1.7.2 Products offered 279
21.1.7.3 Recent developments 280
21.1.7.3.1 Product launches 280
21.1.7.3.2 Deals 280
21.1.7.3.3 Other developments 283
21.1.8 TOMTOM INTERNATIONAL BV 284
21.1.8.1 Business overview 284
21.1.8.2 Products offered 285
21.1.8.3 Recent developments 287
21.1.8.3.1 Product launches 287
21.1.8.3.2 Deals 289
21.1.8.3.3 Other developments 291
21.1.9 CONTINENTAL AG 292
21.1.9.1 Business overview 292
21.1.9.2 Products offered 293
21.1.9.3 Recent developments 294
21.1.9.3.1 Product launches 294
21.1.9.3.2 Deals 295
21.1.9.3.3 Expansions 297
21.1.9.3.4 Other developments 298
21.1.10 VISTEON CORPORATION 299
21.1.10.1 Business overview 299
21.1.10.2 Products offered 300
21.1.10.3 Recent developments 301

21.1.10.3.1 Product launches 301
21.1.10.3.2 Deals 302
21.1.10.3.3 Expansions 304
21.1.10.3.4 Other developments 304
21.2 OTHER PLAYERS 305
21.2.1 DESAY INDUSTRY 305
21.2.2 DENSO CORPORATION 306
21.2.3 JVCKENWOOD CORPORATION 307
21.2.4 FUJITSU 308
21.2.5 FORYOU CORPORATION 309
21.2.6 HYUNDAI MOBIS 310
21.2.7 FORD MOTOR COMPANY 311
21.2.8 APTIV 312
21.2.9 MARELLI HOLDINGS CO., LTD. 313
21.2.10 GENERAL MOTORS 314
21.2.11 AUDI AG 315
21.2.12 BMW GROUP 316
21.2.13 AISIN CORPORATION 317
21.2.14 ALLEGRO MICROSYSTEMS, INC. 318
21.2.15 FAURECIA S.E. 319
22 RESEARCH METHODOLOGY 320
22.1 RESEARCH DATA 320
22.1.1 SECONDARY DATA 321
22.1.1.1 List of key secondary sources 322
22.1.1.2 Key data from secondary sources 322
22.1.2 PRIMARY DATA 323
22.2 MARKET SIZE ESTIMATION 324
22.2.1 BOTTOM-UP APPROACH: IN-VEHICLE INFOTAINMENT MARKET,
BY COMPONENT, VEHICLE TYPE, AND COUNTRY (ICE VEHICLES) 325
22.2.2 TOP-DOWN APPROACH: IN-VEHICLE INFOTAINMENT MARKET,
BY CONNECTIVITY 326
22.2.3 FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES 327
22.3 FACTOR ANALYSIS 328
22.4 DATA TRIANGULATION 329
22.5 RESEARCH ASSUMPTIONS & RISK ASSESSMENT 330
22.6 RESEARCH LIMITATIONS 331
23 APPENDIX 332
23.1 INSIGHTS OF INDUSTRY EXPERTS 332
23.2 DISCUSSION GUIDE 332
23.3 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 336
23.4 CUSTOMIZATION OPTIONS 338
23.5 RELATED REPORTS 338
23.6 AUTHOR DETAILS 339

SCOTTS INTERNATIONAL

In-vehicle Infotainment Market by Component (Infotainment Unit, HUD, Passenger Display, Digital IC), Application (Navigation, VPA, App Store, Music, Rear Seat), OS, Connectivity, Form Factor, Display Size, Location, ICE & EV, and Region - Global Forecast to 2032

Market Report | 2026-01-19 | 340 pages | MarketsandMarkets

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	$4950.00
	Multi User	$6650.00
	Corporate License	$8150.00
	Enterprise Site License	$10000.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	

Zip Code*		Country*	
		Date	2026-03-07
		Signature	