

# Automotive Infotainment Systems Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Connected Cars, Software & Cockpit (Automotive & Transportation)

> **Source:** [<https://www.mordorintelligence.com/industry-reports/automotive-infotainment-systems-market>](<https://www.mordorintelligence.com/industry-reports/automotive-infotainment-systems-market>)

> **Scraped Date:** 2026-09-17

## Executive Market Summary

| Market Metric             | Details           |
|---------------------------|-------------------|
| Base Market Size          | USD 28.51 billion |
| Projected Forecast (2031) | USD 28.51 billion |
| Growth Rate (CAGR)        | 6.11 %            |
| Largest Market Region     | N/A               |
| Fastest-Growing Region    | N/A               |

## Market Visualizations & Infographics

! [Major players in Automotive Infotainment Systems industry](images/chart\_2.png)

! [Automotive Infotainment Systems Market Size](images/chart\_3.png)

! [Automotive Infotainment Systems Market Share by Installation Type, 2025](images/chart\_4.png)

! [Automotive Infotainment Systems Market Share by Connectivity Generation, 2025](images/chart\_5.png)

! [Automotive Infotainment Systems Market Growth Rate by Region](images/chart\_6.png)

! [Automotive Infotainment Systems Market Concentration](images/chart\_7.png)

! [Icon](images/chart\_8.png)

! [footer background image](images/chart\_10.png)

! [Mordor Intelligence on Facebook](images/chart\_12.svg)

! [Mordor Intelligence on Pinterest](images/chart\_14.svg)

! [Mordor Intelligence on Instagram](images/chart\_15.svg)

! [ESOMAR](images/chart\_17.png)

! [GPTW](images/chart\_19.png)

## Comprehensive Research Analysis

### Overview Points List Flex 49 Share Feature End

|                           |              |                   |
|---------------------------|--------------|-------------------|
| Market Overview           | Study Period | 2019 - 2031       |
| Market Size (2026)        |              | USD 28.51 Billion |
| Market Size (2031)        |              | USD 38.35 Billion |
| Growth Rate (2026 - 2031) |              | 6.11 %            |
| Fastest Growing Market    |              | South America     |
| Largest Market            |              | Asia-Pacific      |

Market Concentration | Medium |

Major Players\*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

|

### ### Market Overview

Automotive Infotainment Systems Market Analysis by Mordor IntelligenceThe Automotive Infotainment Systems Market size is estimated at USD 28.51 billion in 2026, and is expected to reach USD 38.35 billion by 2031, at a CAGR of 6.11% during the forecast period (2026-2031). This momentum reflects the pivot from hardware-centric dashboards to software-defined cockpits, where over-the-air updates, 5G telematics, and generative AI assistants are reshaping user experience and revenue models. Automakers are merging infotainment, driver monitoring, and ADAS visualization on single domain controllers to compress bill-of-materials cost, while eCall regulations and battery-electric-vehicle adoption broaden the installed base of connected head units. Semiconductor firms and cloud-native software suppliers are challenging tier-1 incumbents, and subscription economics are gaining prominence as OEMs seek to offset lost service revenue from electrified powertrains. Geopolitical supply-chain risk and cybersecurity compliance under UNECE WP.29 remain key watchpoints for the automotive infotainment systems market [1]“WP.29 World Forum for Harmonization of Vehicle Regulations,” United Nations Economic Commission for Europe, [unece.org](https://unece.org) .

Key Report Takeaways\* By installation type, in-dash systems held 73.27% of the automotive infotainment systems market share in 2025, while rear-seat entertainment is expanding at a 6.13% CAGR through 2031.

\* By vehicle type, passenger cars commanded an 81.31% share in 2025; light commercial vehicles are advancing at a 6.18% CAGR through 2031.

\* By component, head units and domain controllers accounted for 43.43% of revenue in 2025, whereas operating-system software and apps are growing at a 6.27% CAGR.

\* By propulsion, internal combustion vehicles still represented 66.71% of installations in 2025, yet battery electric vehicles are increasing at a 6.15% CAGR.

\* By connectivity, 4G LTE captured 65.64% share in 2025; 5G connectivity is moving ahead at a 6.21% CAGR.

\* By operating system, Linux-based platforms, including Android Automotive OS, held a 36.12% share in 2025, and Android Automotive OS alone is rising at a 6.29% CAGR.

\* By sales channel, OEM-installed systems dominated with 87.72% share in 2025, while the aftermarket is expanding at a 6.24% CAGR.

\* By geography, Asia Pacific led with 38.77% share in 2025; South America is forecast to post the fastest regional growth at a 6.17% CAGR through 2031.

### ### Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Automotive Infotainment Systems Market\*Driver | (~) % Impact on Market CAGR | Geographic Relevance | Impact Timeline |

Consumer Demand for Connected Services & 5G Roll-out | +1.4% | Global, led by North America, Europe, and Asia Pacific urban centers | Short term ( $\leq 2$  years) |

Shift toward Software-Defined Vehicles & Digital Cockpits | +1.3% | Global, with leadership in Europe (Germany) and China | Medium term (2-4 years) |

Integration of ADAS-Centric HMI into Infotainment Head Units | +1.2% | Global, with early adoption in Europe and North America | Medium term (2-4 years) |

Mandatory eCall & Data-Logging Regulations | +0.8% | South America (Brazil), Asia Pacific (India), Middle East & Africa | Short term ( $\leq 2$  years) |

Cloud-Native Updates Enabling Feature-on-Demand | +0.7% | Global, with North America and Europe leading subscription adoption | Medium term (2-4 years) |

In-Car E-commerce / App-Store Monetisation | +0.6% | North America and Europe; e

merging in Asia Pacific | Long term ( $\geq 4$  years) |  
Source: Mordor Intelligence |

### ### Competitive Landscape

#### Competitive Landscape

The automotive infotainment systems market is moderately fragmented. Tier-1 suppliers like Harman, Bosch, Continental, Denso, and Visteon now contend with heightened competition from Qualcomm, Nvidia, and NXP. They also face challenges from software-centric firms such as Elektrobit and BlackBerry QNX. Qualcomm's Snapdragon Cockpit Elite, now powering systems for BMW, Volvo, and General Motors, boasts significant graphics enhancement. It adeptly manages both ADAS and entertainment tasks on a single SoC. In a strategic move, Harman teamed up with Qualcomm in recent years, integrating Luna AI avatars with Ready Vision's augmented-reality features. This collaboration targets European and Chinese automakers, emphasizing the industry's shift towards emotionally attuned cabins.

There's potential in fleet-focused infotainment and retrofitting solutions for older vehicles. In a notable shift, Xbox partnered with LG in recent years, integrating cloud gaming into rear-seat displays, sidestepping conventional suppliers. BMW's patent on its Panoramic Vision HUD, which spans the windshield, underscores a growing emphasis on proprietary intellectual property in augmented-reality.

To avoid being sidelined as value shifts upwards, traditional hardware vendors must bolster their software and cloud proficiencies. Aptiv's recent introduction of a software-defined architecture, which seamlessly integrates infotainment, telematics, and body control, highlights the strategic evolution needed to succeed in the dynamic automotive infotainment landscape.

#### Automotive Infotainment Systems Industry Leaders\* Denso Corporation

- \* Harman International
- \* Aisin Corporation
- \* Pioneer Corporation
- \* Continental AG

\* \*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

### ### Scope Methodology P Space

For this study, the automotive infotainment systems market covers in-vehicle systems that combine display-based media, navigation, connectivity, and related software and modules. These are sold as factory-fitted or aftermarket solutions across passenger and commercial vehicles.

Scope exclusions: We exclude basic audio-only radios without a display, standalone portable navigation devices, and smartphone apps that run independently of the in-car head unit.

### ### Segmentation Container

- \* By Installation Type\* In-dash Infotainment
- \* Rear-seat Infotainment
- \* By Vehicle Type\* Passenger Cars
- \* Light Commercial Vehicles

- \* Medium and Heavy Commercial Vehicles
- \* By Component\* Display / Touch-screen Module
- \* Head Unit / Domain Controller
- \* Operating-System Software & Apps
- \* Connectivity ICs & Antenna Modules
- \* By Propulsion Type\* Internal-Combustion Engine Vehicles
- \* Battery Electric Vehicles
- \* Hybrid Electric Vehicles
- \* By Connectivity Generation\* 4G LTE
- \* 5G
- \* Legacy 2G/3G
- \* By Operating System\* Linux-Based (AAOS, AGL, etc.)
- \* QNX
- \* Android Automotive OS
- \* Others (Proprietary, RTOS)
- \* By Sales Channel\* OEM-Installed
- \* Aftermarket
- \* By Geography\* North America\* United States
- \* Canada
- \* Rest of North America
- \* South America\* Brazil
- \* Argentina
- \* Rest of South America
- \* Europe\* Germany
- \* United Kingdom
- \* France
- \* Italy
- \* Spain
- \* Rest of Europe
- \* Asia Pacific\* China
- \* India
- \* Japan
- \* South Korea
- \* Rest of Asia Pacific
- \* Middle East and Africa\* United Arab Emirates
- \* Saudi Arabia
- \* South Africa
- \* Turkey
- \* Rest of Middle East and Africa

## ## Frequently Asked Questions

#### What revenue growth is expected for automotive infotainment between 2026 and 2031?

The automotive infotainment systems market is projected to expand from USD 28.51 billion in 2026 to USD 38.35 billion by 2031, reflecting a 6.11% CAGR.

#### Which connectivity technology will gain the most traction inside vehicles by 2031?

5G telematics will record the fastest uptake, rising at a 6.21% CAGR as carriers

deploy network slicing and ultra-low-latency services for V2X communication.

#### Why are automakers emphasizing software-defined cockpits?

Software-defined architectures allow over-the-air feature rollouts, reduce hardware complexity through domain controllers, and create subscription revenue streams that offset declining service income from electric powertrains.

#### How do eCall regulations influence infotainment demand in emerging markets?

Mandatory eCall requirements in Brazil, India, and pending rules in Turkey and South Africa force every new vehicle to carry cellular modems and GPS, embedding connected infotainment capability by default and opening doors for paid services.

#### What is the main cybersecurity challenge for next-generation infotainment?

Compliance with UNECE WP.29 and ISO/SAE 21434 introduces stringent processes for threat detection, secure updates, and liability management, adding cost and extending development timelines while safeguarding against fleet-wide exploits.